



CALL FOR PROPOSALS FUNDRAISING AND DEVELOPMENT CONSULTANT

A. Introduction

COSTI is a long-established charity dedicated to providing educational, social and employment services to help immigrants and refugees residing in the Greater Toronto Area and beyond, attain self-sufficiency in Canadian society, through innovative solutions and collaborative partnerships.

COSTI is dedicated to improving the settlement, engagement, wellness and quality of life of newcomers by creating and delivering sound programs and policies, and strengthening key partnerships. During its more than 65 years as an independent nonprofit, COSTI has led and managed hundreds of projects and programs ranging from small local community programming to large, multi-site programs with national and international significance.

COSTI's Board of Directors has identified the need to increase and diversify funding as an organizational priority. Through this Call for Proposals (CFP), COSTI seeks bidders to provide the services and specifications as outlined below for a Fundraising and Development Consultant (Consultant). The Consultant will work with Board Members, the Executive Director and Senior Management in building fundraising capacity, as well as in the development of a fundraising strategy to diversify sources of unrestricted funds.

The Fundraising and Development Consultant must demonstrate the ability to develop and articulate COSTI's case for support across a diverse group of constituents, including demonstrated ability to: secure major gifts and networking in securing funds for important organizational causes; manage complex agendas; and entrepreneurial flair.

B. Proposal Format

In order for COSTI to conduct the most efficient proposal evaluation, bidders are required to include the following information in their proposals as described below:

1. **Contact Information:** A description of the bidder and detailed contact information.
2. **Price Schedule:** A description of the bidder's price schedule – daily or hourly rates.
3. **Capability Statement:** A detailed response to the service/specifications requested.
4. **Bidder's References:** A list of references with detailed contact information (3 minimum).



C. Required Services/Specifications and Deliverables

1. Detailed Scope of Work and Deliverables

a) Assess COSTI's current fundraising program, board and staff expectations, current capacity and environmental context for fundraising.

1. Identify strengths and weaknesses of existing fundraising plan and infrastructure to determine areas for improvement and development.
2. Assess the opportunities and threats external to the organization as well as the agency readiness that will inform the fundraising plan to ensure its success.

b) Build on the current fundraising plan in order to develop and implement a multi-year fund development plan and implementation strategy to build a fundraising program and sponsorship that generates \$350,000 annually in unrestricted revenue and is reflective of and in alignment with COSTI's mission/vision/values and capacity to execute and sustain.

1. Develop and implement an overall fundraising strategy that builds on COSTI's strengths and includes comprehensive and clear plans for identifying, cultivating, soliciting and stewarding gifts.
2. Develop a comprehensive multi-year fundraising plan with concrete measurable goals, annual calendar, metrics and timelines and strategies to sustain current donor relations and increase COSTI's fundraising efforts and donations from (i) individuals (ii) corporations and (iii) special events.
3. Recommend key components and tactics for implementation, including: planning and event follow-up for major donations and bequests.
4. Provide and present the fundraising plan to the Senior Management Team, Development Council and Board Members by April 15, 2020.

c) Enhance existing fundraising programs, design and implement new programs to expand the work of the organization.

1. Research and identify potential funding sources available to COSTI, including corporate and foundation grants. Prepare grant applications as appropriate in consultation with the General Manager of Programs and Community Development.
2. Create and implement a major gifts stewardship program aimed at cultivating deeper ties with current and new donors.
3. Develop a donor acknowledgement and recognition plan.



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d) Initiate the implementation stage in conjunction with the Executive Director and Marketing and Communications Office from April 15, 2020 to December 30, 2020 following the completion of the plan.

1. Test and implement strategies outlined in approved plan and outlined in (b) and (c) above, with at a minimum of ten high potential donors, identified in the current fundraising plan.
2. Identify new, vetted, high-potential donors or prospects.
3. Provide specific recommendations on communications strategy to support fund development and in partnership with the Marketing and Communications Office, develop collateral and online materials to be used for fundraising.
4. Provide guidance to Development Council Members, Executive Director and Senior Management staff on support required to implement the fundraising plan.
5. Recommend a potential course of action to identify resources and establish roles to meet the fundraising strategies outlined in the plan.

D. Budget

Consultants are to recommend the number of working days required to achieve deliverables and provide daily consulting rate(s) for the work. The budget must not exceed \$85,000.00 (this must include HST, but does not include design and production of materials where required).



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E. Selection Criteria and Evaluation

The following evaluation criteria will be utilized to evaluate the proposals by an internal evaluation team from COSTI: Technical Capacities; Past Performance; Cost Reasonableness; Cost Competitiveness.

Qualifications

1. The successful bidder must have a proven track record for creative excellence in developing fundraising plans and developing organizations' fundraising capacity and have the ability to work independently; excellent written and verbal communications, including public speaking and presentation skills; and with strong outcomes orientation that gets results.
2. Post-secondary education and training in fundraising and five years' experience in fundraising.
3. Demonstrated experience in leading the development and execution of leadership gifts and pledges, identifying potential donors, preparing materials for solicitation, securing meetings, preparing follow-up materials and coordinating appropriate stewardship for leadership gifts.
4. Proven track record for raising funds from individual and corporate donors.
5. Experience with personal solicitation, direct mail/telemarketing techniques and related methods for building and sustaining annual support from a broad cross-section of constituencies, including private sector corporations and philanthropic foundations.
6. Strong strategic planning and critical thinking skills.
7. Experience in organizing, training and motivating volunteers.
8. Experience in Microsoft Office applications and solid understanding of leading donor software applications.
9. Demonstrated entrepreneurial experience, results oriented, well organized and able to function independently.
10. Membership in the Association of Fundraising Professionals is an asset.

Proposal Elements

1. Overall Submission: including a letter of introduction, with executive summary that demonstrates an understanding of the Call for Proposal.
2. Profile of Consultant (experience and qualifications).
3. Experience with similar projects and three (3) references.
4. Workplan and resource: description of how consultant plans to achieve goals and deliverables; identification of expected challenges; understanding of organizational and local issues; fundraising assets and opportunities
5. Total Cost and Cost Effectiveness: number of hours/days of work; daily rate(s) of consultant; total cost plus HST and includes labour, other overhead, materials, equipment, travel, disbursements.

Timeline

Timeframe: The target date for completion of this work is from February 2020 to December 2020. There is a possibility for contract extension with new deliverables for 2021.



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F. SOLICITATION GUIDELINES

1. Agreement

COSTI intends to issue a Time & Expenses (T&E) agreement to the successful bidder from this procurement process. The agreement will outline approved billing rates for each type of service provided, deliverables and the terms and conditions applicable to the work performed.

2. Discretion

COSTI may, at its sole discretion and after the evaluation process, choose not to issue any agreement as a result of this process. COSTI may also, at its sole discretion, choose to issue as many or as few agreements as deemed necessary to meet COSTI's business needs.

3. Offers/Quotations

Prices must be inclusive of all costs, including taxes and fees, in Canadian dollars. Quotes and prices should remain valid for thirty (30) calendar days from proposal submission.

4. Proposal Costs

There is no reimbursement for costs associated with the preparation or submission of proposals in response to this CFP, or costs associated with possible award negotiation.

G. SUBMISSION OF PROPOSALS AND CLOSING TIME

Paper or electronic submissions are accepted to:

Paulina Carrión

COSTI

1710 Dufferin Street

Toronto, ON M6E 3P2

Email: Paulina.Carrion@costi.org

Proposals are due by January 10, 2020, 4:30 pm – Eastern Standard Time

All questions pertaining to this proposal must be made via email to communications@costi.org.

Incomplete proposals will be rejected.

Proposals that are delivered late will not be considered.