

CONFIDENTIAL REQUEST FOR PROPOSALS For Consulting Services

Closing Date: Thursday, September 13, 2018 at 4:00 pm MST (no late submissions will be considered)

Introduction

Canadian Mental Health Association – Edmonton (CMHA) promotes the mental health of all community members and supports the resilience and recovery of people experiencing mental illness. CMHA accomplishes this mission through advocacy, education, and service. CMHA provides a wide range of innovative services and supports to people who are experiencing mental illness or distress as well as to their families. One of the core goals of these services is to support recovery so that people with mental illness can further develop tools to lead the life that is meaningful to them. CMHA has provided service in the Edmonton area since 1954 and is a respected community partner.

CMHA desires to increase and diversify revenue sources, maximize and increase fundraising efforts, improve donor stewardship and expand our housing portfolio. Following several years of rapid growth due to an organizational merger and increased public attention on mental health and wellbeing; the need to increase and diversify funding has been identified as an organizational priority. Through this Request for Proposals (RFP), CMHA seeks bidders to provide the services and specifications as outlined below for a Fund Development Consultant in order to build out a robust and sustainable fund development plan for final approval of the board. The Consultant will consult with board members and will develop a fund development strategy to diversify sources of unrestricted funds.

Scope of Work

Develop a comprehensive fund development plan that sets annual 3-year and 5-year goals. The plan will include:

1. Events strategy, with a focus on:
 - Revamping the annual “Have a Heart” signature event so that it makes at least \$50k annually
 - Scaling up the breakfast in support of the Distress Line
2. Donor strategy, with a focus on:
 - How to give digitally
 - Easy monthly giving
 - Asks that are focused on particular needs
3. Gifts in kind strategy, with a focus on:
 - Goods and services to support the housing strategy, e.g.:
 - Furniture/ appliances/ renovation services
4. Planned giving/ memorial gift strategy, with a focus on:
 - Supporting bereaved families
5. Major gifts strategy, with a focus on:
 - Major capital projects, such as the seniors housing/ administrative centre

6. Supporting third party events in order to maximize their success, for example:
 - Providing them with brand materials etc.
7. Approach to grant applications, to ensure that:
 - Grants for which CMHA is eligible are applied for

Proposal Content Mandatory Requirements

All submissions must include:

- Proponents must include a pricing summary
- Proponents must include a detailed response to the service/specifications requested
- Proponents must include a list of three (3) references with detailed contact information
- Proposals are not to exceed 10 (ten) pages
- Proponents must submit 1 (one) electronic copy by the closing date above
- Proponents must be able to start the scope of work immediately upon the award of the contract. Expected completion date is October 19, 2018

Proponent Preferred Criteria

- Proponents with consulting experience in the non-profit charity sector
- Proponents with experience working with organizational change

Key Target Dates

- Release of RFP: August 28, 2018
- Closing Date: September 13, 2018
- Awarding of Contract: September 25, 2018
- Completion of Contract: October 19, 2018

Proposals are to be submitted to:

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