



Request for Proposals (RFP)

Fundraising Consulting Services

Organization Overview

The Rural Ontario Institute (ROI) develops, connects and informs rural leaders. ROI is a non-profit, charitable organization with a small footprint of two permanent full-time staff, two part-time permanent staff and project staff who have time-limited contracts depending on grant and project funding.

ROI's flagship agricultural leadership program AALP has 450 + graduates who sustain a strong agriculture sector. Many graduates of the program also serve on Boards of rural non-profits and/or are engaged with municipal councils.

A recent pilot young adult Change Makers program prepared young adults to mobilize initiatives in their own communities. Cohorts of 20-30 participants build networks and communities of practice.

In addition to participants in capacity-building experiential leadership programs we enable peer-to-peer knowledge exchange of effective community development strategies and inform a network of 3 thousand plus stakeholders by providing accessible data on rural socio-economic trends.

ROI builds capacity amongst rural stakeholders to exchange solutions for common rural challenges. In 2019-20 we held 5 governance webinars, disseminated 6 papers on priority rural community development issues, conducted 3 community well-being demonstration projects/webinars with partners, joined up 10 localities in an internship program for youth engagement, trained 4 organizations in program evaluation and published the rural Community Index of Wellbeing report.

Annually we provide 20 statistical factsheets that inform understanding within provincial ministries, municipal governments and not-for-profit and regional agencies about key trends impacting rural well-being. ROI regularly collaborates to generate specific reports on issues – e.g. Ontario 211 needs analysis, rural homelessness or newcomer attraction and integration.

Typically ROI has an annual budget that fluctuates in the \$750 k to \$1.5 million range over the ten years we have existed. Approximately 25 % of that budget is based on revenues from provincial Transfer Payment Agreements, 10-15 % from corporate and organization program sponsors, 20 % from program revenues (participant fees), 10-15 % donations/fundraising, 10 % from business development and endowments. Project based grants over the years have seen both banner years and dry periods. ROI is following a revenue diversification strategy to reduce dependence on the government transfers. ROI is seeking a company or professional fundraising to plan several key campaigns to support that strategy.

Objectives

ROI seeks to engage an experienced fundraising consultant or consulting firm to provide strategy, direction (advice) and design three fundraising campaigns. To support the implementation of these campaigns the consultant will also prepare the Board, staff and a group of volunteers for their roles in executing the plans. The consultant will not implement the campaigns but will be instrumental in drafting campaign project plans with timeframes/objectives, key steps/milestones and for creating draft communication products – letter templates/key messages etc..., outlining outreach tactics (social media and otherwise). Also the consultant will advise on the systematization of ROI processes for client/contact management including tactics to optimize for identification of potential donor or sponsor audiences. . Each of the three campaign plans should also specify methods to assess the effectiveness of the campaign and critical junctures where any reconsideration of adjustment in tactics/approach might be warranted.

There are three campaigns we are seeking the consultant/professional to plan and assist us to organize and prepare for us to implement:

- a) **AALP Class 18 travel fundraising** – to be initiated in spring 2021 and tentatively targeting current agricultural program sponsors and AALP alumni;
- b) **Rural Change Makers** – introduction of a new program also to be initiated in spring 2021 with corporate sponsor package tentatively targeting rural businesses and banks/insurance companies;
- c) **AALP Legacy Giving** – a longer-term strategy to be implemented over the next few years aimed at AALP Alumni.

Campaign planning for AALP Class 18 and the Rural Change Makers are both to be completed between February and April 2021. The Legacy Giving campaign plan should be completed by July/August 2021.

Should these deliverables be satisfactorily completed there is the possibility of follow-on assignments, e.g. to review and reorganize or replace the traditional AALP gala Dream Auction fundraiser with other event based or on-line alternatives and/or to work on grant proposal strategies for ROI.

Characteristics of the Successful Proponent/Evaluation Criteria:

1. Clear understanding of ROI's mission and values and the assignment as demonstrated by a clear work plan with person days/assigned to tasks.
2. Demonstrated knowledge and experience with the external fundraising environment in which ROI operates.
3. In-depth experience advising the design and implementation of fundraising campaigns.
4. Excellent fundraising campaign planning skills, as demonstrated through successful personnel, schedule, and budget to complete deliverables on past consulting projects.

5. Proven track record in facilitating communication and collaboration between Board and staff and capacity to train and prepare the Board for an appropriate role in support of fundraising.
6. Willingness to engage with AALP volunteers who may have roles in providing feedback on options or draft communication materials.
7. Familiarity with MailChimp, Zoho and other similar tools for contact management is an asset.
8. Demonstrated competence in marketing through both traditional and newer social media Methods.

Please submit your proposal comprising of:

1. An outline of the qualifications of all personnel associated with the completion of the deliverables;
2. A project work plan including beginning and end date, a fee schedule. Your fee schedule is to include per diem rates and related time schedule as well as pricing of any other components.

The work plan should include a proposed meeting schedule and may include such components as:

- a) start-up meeting/discovery with ROI staff;
 - b) any desired brainstorming/idea generation sessions with key ROI program staff and communications team;
 - c) introductory presentation to ROI Board w/r to principles of successful Board roles in non-profit fundraising (our Board is currently strictly a governance Board and reorientation of their role will take time);
 - d) training or orientation session (Board and staff) focussed on preparing to execute the campaigns; and,
 - e) AALP Class 18/AALP volunteer team meeting(s).
3. Information about fundraising campaign(s) you personally and/or your firm successfully planned
 4. Three references from past clients.

Proposals should be submitted on or before 12 Noon Monday February 22 to nragetlie@ruralontarioinstitute.ca

Your proposal consisting of the above documents must be submitted at the same time together in 1 (one) PDF document for your proposal to be considered.

An interview with short-listed candidates may be scheduled to follow..