



Boys & Girls Clubs



Big Brothers Big Sisters



United Way
Alberta Capital Region

Boys & Girls Clubs Big Brothers Big Sisters
of Edmonton & Area



**Edmonton Chamber of
Voluntary Organizations**

Request for Proposal

Field Study - Future of Fundraising

08.06.2021

Introduction

United Way of the Alberta Capital Region (UWACR), Boys & Girls Clubs Big Brothers Big Sisters (BGCBigS) and the Edmonton Chamber of Voluntary Organizations (ECVO) are currently seeking interested firms to conduct a field study on the future of fundraising in the Edmonton Metropolitan Region.

Organizational Background

UWACR

Established in 1941, United Way of the Alberta Capital Region (UWCAR) acts as both a community changemaker and fundraiser to tackle the unignorable issue of poverty in our community. We look at the big picture to deliver a coordinated network of services and programs to address a range of needs for children and families who are struggling. By bringing together partners and strategies, we mobilize collective action to create pathways out of poverty for people in our region.

More information on who we are and what we do can be found at myunitedway.ca.

BGCBigS

Vision:

All children and youth will have enriching experiences growing up and achieve success in life.

Mission:

Boys & Girls Clubs Big Brothers Big Sisters is a community-supported organization committed to the healthy development of children, youth and their families by providing safe places, positive relationships, services and opportunities to develop personal strengths and interpersonal skills that enhance their long-term success in life.

More information on who we are and what we do can be found at bgcbigs.ca.

ECVO

The Edmonton Chamber of Voluntary Organizations helps organizations build and sustain their volunteer programs and services through resources, networking, and skill development opportunities.

We are a member-based non-profit organization serving the non-profit and charitable organizations in Metro Edmonton.

Vision:

A strong, vibrant community strengthened by an effective voluntary sector working with government and business.

Mission:

To strengthen the public service voluntary sector in Metro Edmonton by:

- Leading in the voluntary sector
- Building capacity in the voluntary sector
- Giving voice to issues that impact the ability of the voluntary sector to be effective

More information on who we are and what we do can be found at ecvo.ca.

Organization Details

Project description: Field Study - Future of Fundraising

Company Name: UWACR, BGCBigs and ECVO

Address: c/o United Way of the Alberta Capital Region

15132 Stony Plain Road, Edmonton, AB T5P 3Y3

Procurement Contact Person:

Trish Weber

Vice President, Donor Relations & Resource Development

Phone Number: 780.443.8371

Email Address: tweber@myunitedway.ca

Project Objective

To understand current and emerging trends in the philanthropic environment in the Edmonton Metropolitan Region over next three to five years. This intelligence will be gathered through research and stakeholder interviews and compiled in a final report with future recommendations.

Project Deliverables

1. Research:

- Conduct research and literature review
- Review data compiled by recent brand platform and customer segmentation surveys and interviews conducted by UWACR
- Review COVID survey results from ECVO members
- Identify gaps in data and make recommendations for stakeholder interviews

2. Stakeholder interviews/surveys:

- Stakeholder list determined and provided by UWACR, BGCBigs and ECVO, informed by recommendations from consultancy based on gap analysis
- Develop interview framework/questions
- Develop communication for stakeholder participation
- Conduct interviews along with respective organization for agreed upon stakeholder list

2. Analysis:

- Analyze and interpret all resulting data, identifying trends related to:
 - The future of:
 1. Events (virtual, in person, fundraising, recognition, etc.)
 2. Lotteries (dream home, online 50/50s, etc.)
 3. Peer-to-peer
 4. Matching gift programs
 5. Social enterprise
 6. Recognition
 7. Impact reporting
 - Individual Donor, Foundation, Corporate and Government investments preferences including:

1. Grassroots/non-registered charities
 2. Giving from an EDI lens
 3. Corporate Social Responsibility focus areas by sector
 4. Social Procurement
 5. Municipal, Provincial and Federal spending priorities
 6. Future of partnerships, wrap arounds, collaborative initiatives, etc.
 7. Project based, system change, or capacity building
 8. Technology (AI/digital transformation)
 9. Trust and Accountability
3. Final report and presentation including summary of future recommendations:
- Present final report and specific recommendations for our respective organizations and broader non-profit sector

RFP Timeline

Request for RFP: August 6, 2021

Deadline for Bidders to Submit Questions: August 13, 2021

Representative Responds to Bidder Questions: August 17, 2021

Deadline to Submit Proposal: August 23, 2021

Top Firms may be Contacted for Interview: August 23-30, 2021

Contract Award / Notification to Unsuccessful Bidders: August 31, 2021

Expected Project Completion: November 2021

Respondents to this RFP must submit one digital copy of their proposal which should be clearly marked "RFP: Field Study – Future of Fundraising" and emailed to Trish Weber at tweber@myunitedway.ca.

Elements of Proposal

1. Brief bio that includes highlights of past relevant projects.
2. Capacity and credentials of your organization and proposal team relevant to the deliverables.
3. A statement detailing the availability of services and fees (detail any additional recommended services with costs outside of project scope).
4. A list of not less than three (3) professional references (one from a non-profit) – customers/organizations who have used your services within the last twelve (12) months.

Evaluation Criteria

The successful respondent will possess the following:

1. The overall experience, knowledge, skills, and qualifications to provide these services.
2. Competitive cost of services.
3. The successful proponent will hold professional liability insurance for the named services, including errors and omissions insurance, with a limit of not less of \$500,000 per occurrence.
4. The expertise in working with similar customers in the non-profit sector.