



## **REQUEST FOR PROPOSALS (RFP): FUNDRAISING CONSULTANT FOR ENDOWMENT FUND FEASIBILITY & CAMPAIGN DEVELOPMENT**

The Hamilton Conservation Foundation (the "Foundation") is seeking an experienced fundraising consultant/consulting firm (the "Consultant") to conduct a feasibility study to determine the Foundation's and community's readiness to launch an endowment campaign as further defined in the Scope of Work.

### **ABOUT THE FOUNDATION**

Hamilton Conservation Foundation is a registered charity dedicated to the preservation and rehabilitation of the natural environment and cultural heritage within the Hamilton Conservation Authority (HCA) watershed.

The Foundation was established in 1976 with the following objectives:

- To aid the HCA by receiving gifts of property and money
- To promote the practice of conservation
- To assist in providing conservation education
- To assist in the purchase of property

For more than 45 years, the Foundation has been raising and stewarding funds for the HCA to acquire and protect lands and heritage assets, teach children about nature, and celebrate our cultural heritage.

The Foundation Board of Directors is comprised of 8 - 12 members from the community. A sub-committee has been created to assist with the endowment fund strategy and assist the Board of Directors in selecting the successful proponent.

### **PURPOSE**

The Foundation is looking to grow its existing endowment fund to support the HCA's Outdoor Environmental Education programs. The endowment fund currently has a value of \$800,000 and we wish to increase it to \$3 million to ensure sustainable funding for the education program in perpetuity.

Additional information about the education program is attached in the Appendix.

## **SCOPE OF WORK**

The scope of work has been divided into two phases, as described below. Upon completion of Phase 1, the Foundation will evaluate the findings and determine if the project will continue into Phase 2. Continuing to Phase 2 will be entirely dependent of results of phase one and the Foundation reserves the right to not continue beyond the first phase.

### **Phase 1: Internal Engagement & Feasibility Study Development**

- a. Develop a situational analysis based on review of the Foundation materials.
- b. Provide a feasibility study focused on initial engagement and consultation with our Board of Directors and Endowment Committee that includes a facilitated session to gain their insights and perspectives on our organization's strengths, challenges and capacity to launch and endowment campaign.
- c. Provide an analysis of the community's appetite for an environmental education endowment fund of this magnitude. For the purposes of this study, the "community" is defined as the Greater Hamilton Area.
- d. Outline an implementation strategy to grow the Endowment Fund to \$3 million including each stakeholder's role in the delivery.

### **Phase 2: Campaign Development** *(scope may be adjusted based on learnings from Phase 1)*

- a. Expand the existing endowment fundraising plan to incorporate communications, fundraising and donor stewardship strategies outlined in Phase 1, and develop realistic timelines.
- b. Develop the case for support for the endowment building campaign.
- c. Develop a comprehensive multi-year pro-active planned giving program plan.

Initial and follow up consultation with the Board of Directors and the Endowment Committee will be part of the Phase 1 consultation process. The facilities at the HCA's Administrative Office will be made available to conduct all consultation sessions with the Board, which include hybrid virtual technology.

## **CONSULTANT PROFILE & QUALIFICATIONS**

To accomplish the outlined scope of work, we are seeking proposals from a Consultant who:

- Has demonstrated experience in the development and facilitation of a comparable feasibility study
- Has demonstrated experience and success with endowment fundraising and planned giving programs in excess of \$1 million
- Is familiar with the fundraising landscape within the Greater Hamilton Area
- Although it is not mandatory, additional consideration will be given to proponents who are familiar with the work of the Hamilton Conservation Foundation and the Hamilton Conservation Authority

## **SUBMISSION PROCESS & REQUIREMENTS**

Proposals will be accepted by 12:00 noon, May 9, 2023 electronically, in PDF or Word format, via email to:

Grace Correia  
Executive Director  
grace.correia@conservationhamilton.ca  
Subject Line: Endowment Fund Fundraising Consultant

Proposals should be a maximum of fifteen (15) pages, inclusive of appendices, and organized in the following manner:

### **Section 1: Experience and Qualifications ( 30 Points )**

- An overview of the Consultant's profile
- Proposed Consultant's (or team lead's) experience/qualifications
- Related experience in feasibility studies and fundraising support
- Experience in similar work regionally or locally
- Experience in the environmental field (e.g. natural resources, sustainability, climate change, past work with outdoor environmental education)
- Demonstration of facilitation skills working with a Board of Directors, staff, and various stakeholders
- A resume of the principal resource development professional providing direct service for this project

### **Section 2: Project Approach & Workplan ( 40 Points )**

- A narrative that addresses how the Scope of Work, as outlined above, will be accomplished, including a timeline with benchmarks and the number of hours required to accomplish the plan
- An outline of your approach to the development of the feasibility study and implementation strategy and that clearly articulates when and how key deliverables (e.g., engagement sessions, reports, etc.) will be achieved
- Proposed schedule that allots sufficient time for each identified task and provides mechanisms to monitor progress
- Workplan that includes tasks/mechanisms for communicating and collaborating with the staff, Board of Directors and Endowment Committee related to our overall project timelines

### **Section 3: References (10 Points)**

- Provide a minimum of three (3) references from clients who have obtained similar services to those requested in the RFP, from the proponent.

### **Section 4: Pricing Proposal ( 20 Points )**

- Project budget for each phase outlined in the Scope of Work (excluding HST), clearly defining all costs payable by the Foundation.

Failure to comply with or complete any part of this RFP may result in rejection of the proposal.

## EVALUATION & SELECTION

Proposals will be evaluated using the following criteria:

Section	Rated Criteria Category	Weighting (points)
1	Experience and Qualifications	30
2	Project Approach and Workplan	40
3	References	10
4	Pricing	20
	<b>TOTAL</b>	<b>100 points</b>

If determined necessary, the Endowment Committee may develop a short list of Proponents who will be invited to participate in an interview. Based on the information obtained in interviews and feedback from references, the technical ratings may be adjusted.

A sub-committee of the Board of Directors will review all proposals and will make recommendations to the Board of Directors regarding the selection of the Consultant. The Board of Directors will make the final decision regarding the award of the contract.

Only shortlisted proponents will be advised of procurement result.

## COMMUNICATION

All communication regarding this RFP must be directed to Grace Correia, in writing by email, as outlined in the RFP Timeline below.

### **Contact Information:**

Grace Correia  
Executive Director  
grace.correia@conservationhamilton.ca  
Subject Line: Endowment Fund Fundraising Consultant

No person other than the above-named person or their authorized representative may speak for the Foundation with respect to this RFP process.

## RFP TIMELINE

Questions to be received by: April 20, 2023

Responses to questions to be posted by: April 27, 2023

*Questions will be responded to in the form of an Addenda.*

Deadline for submission: 12:00 noon, May 9, 2023

Interviews, if necessary, to be scheduled to begin the week of May 22, 2023

Notification to successful proponent by: June 19, 2023

**CONFLICT OF INTEREST**

By responding to this RFP, the proponent declares that there is no actual or potential Conflict of Interest relating to the preparation of the proposal and does not foresee an actual or potential Conflict of Interest in performing the contractual obligations contemplated by the procurement process.

**CONFIDENTIALITY**

All information provided by or obtained from the Foundation in any form in connection with the RFP either before or after the issuance of the RFP:

- (a) is the sole property of the Foundation and proponents must treat it as confidential;
- (b) is not to be used for any purpose other than replying to the RFP and the performance of any subsequent Project Agreement; (c) must not be disclosed without prior written authorization from the Foundation; and
- (d) shall be returned or destroyed by the proponents to the Foundation immediately upon the request of the Foundation.

It is the responsibility of the proponent to identify any confidential information in its proposal or accompanying documentation. The confidentiality of such information will be maintained by the Foundation. Furthermore, proponents are advised that their proposals will, as necessary, be disclosed on a confidential basis, to the Foundation's stakeholders which may include members of the Board of Directors, various subcommittees, and staff for the purpose of evaluating or participating in the evaluation of their proposals.

# **APPENDIX**

## Outdoor Environmental Education Information



# Environmental Education

## Program Overview

The Hamilton Conservation Authority's Environmental Education program is designed to provide students from elementary to secondary school with hands-on outdoor environmental education experiences that meet overall student learning expectations. The program, run by education professionals, is based out of Dundas Valley Conservation Area, an environmentally significant natural area which provides students with an excellent opportunity to experience diverse habitats that are home to a variety of native plants and animals. Approximately 5,000 students from across the City of Hamilton and beyond participate in the program annually.

This hands-on approach provides students with unique opportunities to apply what they learn in the classroom but, more importantly, the program aims to build knowledge and appreciation of the environment in students from all parts of the city of Hamilton and beyond. Additional virtual opportunities are provided to supplement the hands-on learning and provide follow-up once back in the classroom.

The Environmental Education program offers a series of field trip opportunities for both elementary and secondary school students. Led by education professionals, various selections are offered to classes in both the environmental education and outdoor active program areas. This includes modules on Wildlife, Plants, Fossils/Rocks/Minerals for elementary school students and modules on Habitat Analysis, Forest/Wildlife/Stream Ecology for Secondary school students.

In order to keep costs reasonable for the schools, the Hamilton Conservation Foundation has committed to funding a portion of the annual program costs. The Foundation also raises additional funds to provide transportation subsidies to At-Risk schools and groups that may not have the funds to send students to Dundas Valley, providing these students with an invaluable opportunity to participate in the program.

Opportunities are available to see the program in action and the impact it has on the students.



Hamilton Conservation  
**FOUNDATION**

Your nature • Your legacy



Hamilton  
Conservation  
Authority

A Healthy Watershed for Everyone

The Hamilton Conservation Foundation contributes \$125,000 annually in support of the Hamilton Conservation Authority's (HAC) Outdoor Environmental Education Program plus additional funding for transportation subsidies.

The donations raised through the Foundation augment fees paid by school boards and ensure the program is accessible to all students. These grants and donations are vital to keeping the program alive, and we are grateful to our donors who support the program.

