

Requests for Proposal

Independent Consultancy - Fundraising Feasibility Strategist

Organization Overview

World Renew, an agency of the Christian Reformed Church in North America (CRCNA), is a nonprofit, international development and disaster response organization, with home offices in Burlington, Ontario, Canada, and Grand Rapids, Michigan, USA. World Renew has 18 field offices with currently separate field operations and locally hired staff.

Key Consultancy Objective

World Renew seeks to engage a Feasibility Study Strategist to provide leadership and strategy for a limited feasibility study for a new building, as part of a larger Engagement piece seeking major donor feedback on future thematic areas or specific projects. This will include donor segmentation criteria and prioritization, timeline, messaging to donors the rationale for a building, the financial overview, and relocation impact on World Renew's relationship with the Christian Reformed Church, its primary constituency. The Feasibility Strategist will oversee the interview process and provide training to World Renew Donor Relations staff on how to conduct interviews, document feedback, and direct feedback to other teams and leadership to feed into ongoing discussions around the future work of World Renew. The Feasibility Strategist will consult with the Director of Donor Relations, Chief Advancement Officer, Director of Disaster Response Services (DRS) and other fundraising team leaders as necessary. The work of the consultant will be guided by and coordinated by the Director of Donor Relations.

Consultancy Requirements *(see Terms of Reference for more detail)*

- The Consultancy will be conducted over 6 months
- The Consultancy will yield a completed feasibility study, documented results, and training for Donor Relations staff

Please submit a letter of interest (proposal) that references all of the elements in Section IV.A (Selection Criteria) and Section IV.B (Proposal Submission Requirements) in the attached Terms of Reference on or before September 17, 2021 to World Renew with attention to Luke Theule (ltheule@worldrenew.net).

Letters of interest (proposals) should be no more than ten (10) pages in length. Thank you!

World Renew is not bound to accept any or all of the proposals received.

Donor Relations Consultancy

Terms of Reference

Independent Consultant – Fundraising Feasibility Strategist

I. Introduction

World Renew is a faith based international NGO, with head offices in Grand Rapids, Michigan and Burlington, Ontario. World Renew has staff based in North America, Asia, Latin & Central America and Africa. Its US office is planning a physical relocation and recently purchased a building, and seeks to determine the feasibility of raising additional funds for the building while testing future program ideas with major donors.

II. Scope of Work Fundraising Feasibility Strategist

World Renew is seeking a consultant to provide leadership for the Donor Relations Team US in conducting a limited feasibility study and training to the Donor Relations Team US.

The Fundraising Feasibility Strategist will consult with the Chief Advancement Officer, Director of Donor Relations US, other leaders as needed and individual members of the Donor Relations US team.

The consultant will:

- Design a limited feasibility study on raising additional funds for a new building. Revenue cannot be diverted from ongoing operations and programs
- As part of the feasibility study, include a temperature check on possible future programs and messaging
- Guide the development of necessary material such as FAQs, feasibility study questions, etc.
- Provide training to Donor Relations US staff on how to conduct conversations with donors around their interest and inclination to fund a building project and new programs
- Lead the process of evaluating the results and recommending a viable fundraising goal and plan to achieve a 3-year campaign objective
- Provide recommendations on how the results could fit into a larger cohesive picture of an upcoming 60th anniversary, and future funding model for World Renew
- Be able to work with the Donor Relations team to ideate opportunities to solicit pledges and gifts at 60th-anniversary themed events

Expected Timeline

RFP Issued for Fundraising Feasibility Strategist – September 2021

Fundraising Feasibility Strategist is recruited / contract is finalized – October 2021

Selected Consultant Provides Fundraising Feasibility Strategist Services to World Renew – Starting in October 2021 preparation work with the Donor Relations team prior to commencing the 3-month feasibility study in January 2022.

III. Evaluation Management

A. Roles and Responsibilities

The consultant will be responsible for reporting progress of the work to World Renew's Director of Donor Relations. Progress reports will be monthly video calls with an accompanying written report.

B. Deliverables

The following is an illustrative list of the deliverables that the selectee will be required to provide to World Renew.

Primary Deliverables

- Feasibility assessment
- Silent campaign consulting
- Map out the results to a 3-year multi-million campaign; \$3m is needed to cover remaining purchase costs

Specific Deliverables

- Guide a process to identify prospective donors who would be interested in making either a new, or additional gift or pledge to a new World Renew US building. All revenue must be above expected program and disaster revenue from donors
- Develop a data-driven donor pyramid
- Provide a list, and speak into, necessary material for donor interviews such as FAQs, donor questions, etc.
- Incorporate a temperature check on ideas and messaging of desired programs/sectors/projects from World Renew's Marketing and Communication team, World Renew's SIG Program Working Group, World Renew's Program Excellence and Disaster Response teams.
- Provide training to Donor Relations staff on how to conduct conversations and engagement opportunities with their donors and prospects
- Set up a process for collecting feedback and pulling out relevant information
- Using the results, provide recommendations including an outlined timeline on how this limited campaign feasibility study and temperature check on future programs could fit into a larger and longer campaign plan which includes a 60th anniversary



The deliverables will be reviewed and approved by World Renew Agency Directors, prior to approving submitted monthly invoices consistent with agreed upon milestones and payments with the strategist.

C. Materials to be Provided to the Selected Consultant (“Selectee”) by World Renew

World Renew will provide the selectee with all of the relevant information that the selectee needs to fulfill the terms of the Consultancy, including, but not exclusive of, the following:

- Necessary donor data, giving trends
- Access to staff as needed to carry out the duties required
- Access and coordination with select World Renew donors and prospects

IV. Selection

A. Profile of Consultant/Firm

The individual or organization that is selected to perform the Consultancy will demonstrate the following characteristics:

- The selectee will be financially and legally separate from World Renew
- The selectee will possess the necessary knowledge, analytical capability, language skills, change management process experience and data analysis experience to fulfill the requirements of the Consultancy
- Experience, knowledge of principles and practices of major gift fundraising
- Experience, knowledge of principles and practices of capital campaigns
- Significant experience fundraising in the faith based, international human services sector
- Significant experience in training Major Gifts Officers in the sphere of major gift fundraising and campaigns
- Ability to travel to Grand Rapids as needed during the consultation process
- Maintain confidentiality, professionalism at all times
- Able to evaluate situations, analyze problems, identify alternative solutions and propose practical recommendations
- Able to communicate effectively, both orally and in writing and prepare clear and concise reports/correspondence
- Ten years of fundraising leadership management work experience is required

The submitted proposal will be the primary document upon which the suitability of each offeror will be evaluated. World Renew reserves the right to waive any minor or technical defects or irregularities, and reserves the right to reject any or all submissions.

B. Proposal Submission Requirements

The offeror must submit a proposal that includes the following:

- Budget and proposed timeline, including milestones, for the proposed Consultancy in US dollars.
The proposal should include the consultant's daily and hourly rates.
- Resume or curriculum vitae that includes a detailed summary of the consultant's past experience with similar work.
- Three letters of reference from organizations that the offeror has performed consulting work for in the past.

Please submit a letter of interest (proposal) on or before September 17, 2021 to World Renew with attention to Luke Theule (ltheule@worldrenew.net) that includes all the necessary components as outlined above.

V. Annexes

A. Conditions

By providing a proposal that is responsive to the terms of this RFP, the offeror is confirming that it will abide by the following conditions:

1. **Late Submissions**
Proposals that are received after the Closing Date will not be considered, unless there are, in World Renew's sole discretion, exceptional circumstances which contributed to the submission delay.
2. **Correspondence**
All communications from respondents to World Renew regarding this RFP must be in writing and addressed to the individuals that are identified in the RFP. Any request for information should be received in advance of the Closing Date, as defined in the RFP. Responses to questions from any offeror will be circulated by World Renew to all offerors in order to ensure a fair and transparent contracting process.
3. **Partial Acceptance of Submitted Proposals**
World Renew reserves the right to, unless the offeror expressly stipulates against do so in its submitted proposal, accept whatever portion of a submission that World Renew deems to be most responsive to the stated Objective of the Consultancy. World Renew is under no obligation to accept any proposal that is submitted in response to this RFP.
4. **Alternative Offer**
If the offeror wishes to propose modifications to the Terms of Reference because the offeror believes that such modifications may better enable World Renew to



achieve the specifications that are outlined in the RFP, such modifications may, at World Renew's sole discretion, be considered as an Alternative Offer. The offeror must make any Alternative Offer in a separate letter which accompanies the offeror's submitted proposal. World Renew is under no obligation to accept Alternative Offers.

5. Prices

If the offeror is based in the U.S. or Canada, all prices/rates quoted must be exclusive of all taxes. In the event that an offeror's proposal is selected, the offeror agrees to pay all applicable income taxes.

6. No Reimbursement for Proposal Development Expenses

Any expenses which are incurred in the preparation of proposals that are submitted in response to this RFP will not be reimbursed.

7. Confidentiality

The offeror agrees to treat the RFP, contract and all associated documentation (including the Terms of Reference) and other information related to World Renew's employees, officers, volunteers, partners, business or affairs as confidential. The offeror agrees to:

- Respect the confidence placed in the offeror by World Renew by maintaining the secrecy of confidential information;
- Not use any portion of World Renew's confidential information without World Renew's prior written consent;
- Not use their knowledge of confidential World Renew information in any way that would be detrimental or harmful to World Renew;
- Employ all reasonable and appropriate efforts to prevent the disclosure of confidential information to third parties &
- Notify World Renew immediately of any possible breach of the provisions of this Section and acknowledge that damages may not be an adequate remedy for such a breach.

If selected, the offeror also agrees to not at any time or in any manner, either directly or indirectly, use any information that it acquired in the course of rendering services pursuant to this RFP for its own benefit, or divulge, disclose or communicate in any manner any information to any third party without prior written consent from World Renew. The selectee shall protect information that it acquires in the course of rendering services pursuant to this RFP as confidential, both during the period where it is engaged as a consultant to World Renew, and after the period of the Consultancy has terminated.

8. Exclusion Criteria

The presence of any of the following will disqualify an offeror from consideration:

- The offeror, or any related entity that it regularly partners with or subcontracts to, is insolvent, is having its affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject of proceedings concerning these matters, or is in any analogous situation arising from a similar procedure provided for in national, state or provincial legislation or regulations
- The offeror, or any related entity that it regularly partners with or subcontracts to, has been convicted of fraud, corruption, involvement in a criminal organization, money laundering offences, offences concerning professional misconduct, breaches of applicable labor law or labor tax legislation or any other activity judged illegal by a court of law
- The offeror, or any related entity that it regularly partners with or subcontracts to, has failed to comply with obligations related to the payment of taxes in accordance with the geographic jurisdiction in which offeror operates
- Any offeror will be summarily excluded from consideration if it is found that they are guilty of misrepresentation.

9. Conflict of Interest

The offeror certifies that it is not aware of any prior connection with World Renew that may bias the outcome of the selection process. If the offeror has prior connection(s) with World Renew, the offeror is required to disclose those connections in its proposal submission.

10. Reimbursement of Expenses

World Renew will reimburse the Strategist for reasonable out of pocket expenses that are incurred in connection with the services noted above, including travel and lodging, provided that the Director of Donor Relations of World Renew approves such expenses in advance.