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REQUEST FOR PROPOSAL (RFP)

FUND

DEVELOPMENT PLAN



50 BURNHAMTHORPE ROAD WEST,

SUITE 300

MISSISSAUGA, ON,

L5B 3C2

AUGUST 28, 2023



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1. SUMMARY AND BACKGROUND

Peel Senior Link is currently accepting proposals for a consultant to identify funding opportunities and outline a clear path forward in establishing a Fund Development plan.

The purpose of this Request for Proposal (RFP) is to solicit proposals from various consulting firms, conduct a fair and extensive evaluation based on criteria listed herein, and select the candidate who best represents the direction Peel Senior Link wishes to go within our project scope, timeline and budget.

Peel Senior Link, a non-profit charitable organization established in 1993, provides personal care & home-making and other complementary support services. Peel Senior Link maximizes independent living--helping seniors live with dignity, stability, and safety. Peel Senior Link is funded by the Ministry of Health and Long-Term Care through Ontario Health - Central, grants, and personal and corporate donations.

2. PROPOSAL GUIDELINES

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 5pm EST September 30, 2023. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

If the organization submitting a proposal must outsource or contract any work to meet the requirements contained herein, this must be clearly stated in the proposal. Additionally, all costs included in proposals must be all-inclusive to include any outsourced or contracted work. Any proposals which call for outsourcing or contracting work must include a name and description of the companies being contracted.

All costs must be itemized to include an explanation of all fees and costs.

Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by Peel Senior Link and will include scope, budget, schedule, and other necessary items pertaining to the project.

3. PROJECT PURPOSE AND DESCRIPTION

The purpose of this project is as follows:

The organization's goal is to diversity revenue streams to increase resiliency and sustainability, help with recovery and, by extension, ease the pressures on staff capacity which increased dramatically during the multi-year COVID-19 pandemic.



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Our current model does not capture the changes in demand for the health care services we provide.

Project Description:

Peel Senior Link is seeking a Funding consultant to provide an update to our funding policies and structures. The consultant will provide an analysis, research, strategies, practices, and plans to secure resources for our organization over the long-term basis.

4. PROJECT SCOPE

The scope of this project includes Improving and increase ability to access financial resources and develop new and/or alternative sources of revenues (e.g. develop fundraising plans, identify fundraising and financial technology resources, seek opportunities for public-private partnerships, social enterprises)

Through this plan, PSL aims to:

- Through the help of a consultant - better understand the donor landscape, PSL's position and the intersection of opportunities;
- establish a roadmap for developing and sustaining a Fund Development program
- develop a clear, well-informed Fund Development plan based on best practices and emerging trends
- With an addition of a cloud-based constituent relationship management software package – build on the existing donor relationship with better, more informed, data-based stewardship practices;
- with better tracking and reporting, leverage metrics to build more informed campaign strategies and offer better reporting to stakeholders;
- establish a communications plan including social media and website platforms;
- create a centralized repository of donor information for more effective, collaborative fundraising practices.

5. REQUEST FOR PROPOSAL AND PROJECT TIMELINE

Request for Proposal Timeline:

All proposals in response to this RFP are due no later than 5pm EST October 13, 2023.

Evaluation of proposals will be conducted from October 16, 2023 until November 1, 2023. If additional information or discussions are needed with any bidders during this two week window, the bidder(s) will be notified.



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The selection decision for the winning bidder will be made no later than November 5, 2023.

Upon notification, the contract negotiation with the winning bidder will begin immediately. Contract negotiations will be completed by November 10, 2023.

Notifications to bidders who were not selected will be completed by November 15, 2023.

Project Timeline:

Project initiation phase must be completed by December 1, 2023.

Project planning phase must be completed by December 15, 2023. Project planning phase will determine the timeline/schedule for the remaining phases of the project.

6. BUDGET

All proposals must include proposed costs to complete the tasks described in the project scope. Costs should be stated as one-time or non-recurring costs (NRC) or monthly recurring costs (MRC). Pricing should be listed for each of the following items in accordance with the format below:

Project Initiation and Planning	NRC	MRC
Market Research	NRC	MRC
Site/Database Development	NRC	MRC
Grant writing	NRC	MRC
Grant submissions	NRC	MRC

NOTE: All costs and fees must be clearly described in each proposal.

7. BIDDER QUALIFICATIONS

Bidders should provide the following items as part of their proposal for consideration:

- Description of experience in planning, building, and maintaining a database of funders
- Establish a roadmap for developing and sustaining a Fund Development program
- List of how many full time, part time, and contractor staff in your organization
- Testimonials from past clients
- Anticipated resources you will assign to this project (total number, role, title, experience)
- Timeframe for completion of the project
- Project management methodology



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8. PROPOSAL EVALUATION CRITERIA

Peel Senior Link will evaluate all proposals based on the following criteria. To ensure consideration for this Request for Proposal, your proposal should be complete and include all of the following criteria:

- Overall proposal suitability: proposed solution(s) must meet the scope and needs included herein and be presented in a clear and organized manner
- Organizational Experience: Bidders will be evaluated on their experience as it pertains to the scope of this project
- Previous work: Bidders will be evaluated on examples of their work pertaining to web site design and hosting as well as client testimonials and references
- Value and cost: Bidders will be evaluated on the cost of their solution(s) based on the work to be performed in accordance with the scope of this project
- Technical expertise and experience: Bidders must provide descriptions and documentation of staff technical expertise and experience

Each bidder must submit a copy of their proposal to the address below by 5pm EST October 13, 2023:

Peel Senior Link
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Mississauga, ON, L5B 3C2
p. 905 712 4413 x326
c. 416 388 1539
f. 289 201 1955
e. Althea@peelseniorlink.com
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