Office of the President & Vice Chancellor

Request for proposal:
Fundraising Services/Consultant

Issued:
August 3, 2023

Closing Date & Time:
Proposals are requested to be received electronically prior to 4 PM MST on August 25, 2023

Project Contact:
Thérèse Takacs, Vice President, Advancement
14500 Bannister Rd. SE, Calgary AB, T2X 1Z4
Email: therese.takacs@stmu.ca

The deadline for questions is seven (7) business days before the closing date.
1. Purpose

St. Mary's University is seeking to engage an experienced fundraising consultant or consulting firm to provide interim fundraising counsel, leadership and direction to the University and its Development teams, as well as help to identify key steps in Campaign Readiness.

2. Project Description

St. Mary's University through this Request for Proposal ("RFP") invites qualified fundraising consultants to submit proposals to provide fundraising counsel, working with the President, President's Council and the Fund Development and Advancement team on Major Gift, Annual and Campaign Readiness over a four-to-six-month timeline.

St. Mary's is at a strategic crossroads. In December 2022, our Board of Governors and President's Council Team embarked on developing a new five-year strategic plan (2023 – 2028) and engaged in robust consultation with students, faculty, staff, alumni, community partners and other stakeholders to develop the vision and direction of the next strategic plan for StMU.

The new strategic plan will identify priorities, new initiatives and strategic directions and opportunities for StMU to continue to enhance and expand its mission impact while providing a high-quality, relevant, and innovative education to our students and ensure a sustainable and vital institution, in strengthening campus life, our workplace and in building our community.

The plan will anticipate the overall strategic direction of the University for the next decade. A draft will be completed by fall 2023 to be shared with campus constituencies and in preparation for the December 2023 Board of Governors approval.

The 2023-2028 strategic plan will lead to a new Fund Development Strategy that looks to shift the predominant type of giving the institution typically pursues and receives from smaller, annual donations for awards and bursaries, to a major gift, capital and program investment, and endowment-based approach.

St. Mary's University is looking for a fund development agency partner (successful proponent) to work with our internal team and key stakeholders to assess the our state of readiness to deliver on the new strategic plan, support ongoing fund development efforts, assist in the launch of an Alumni giving strategy, explore the feasibility of a multi-million capital campaign, and if warranted, provide support in achieving, directly and indirectly, the attainment of a transformational fundraising goal.

*The proposed length of the contract for the successful proponent(s) will be four (4) months with options to extend it on a month-by-month basis.*
3. Background

St. Mary's University is a dynamic and innovative teaching and research university located on a beautiful historic site. We provide affordable, accredited and highly valued degrees in the Liberal Arts, Sciences and Education. Founded in the Catholic Intellectual Tradition, and as the only independent Catholic university in Canada, St. Mary’s University prepares its students to live with integrity, compassion and confidence while embodying a compassionate commitment to ethics, social justice, and respect for diversity of opinion and belief. St. Mary’s became a proud member of Universities Canada in 2022, and has over 1000 full- and part-time students, approximately 200 full- and part-time faculty and staff, and an average class size of 25.

Located in Mohkínstsis (Calgary) on the ancestral territory of the Blackfoot Confederacy (Siksika, Kainai, and Piikani First Nations), the Tsuut’ina and Îyârhe Nakoda Nations, as well as the Metis Nation, Region 3, St. Mary's is focused on developing the whole person: mind, body and spirit. Consistent with our Catholic values, St. Mary’s University is committed to fostering an institutional culture that values, supports, and promotes equity, human rights, respect, and accountability within our community. St. Mary's is a university where all are welcome and inclusive excellence is important. We are committed to removing barriers for those who have been historically underrepresented or discouraged in our society.

St. Mary's University is in a transformative time – we are an ambitious institution that through its new strategic plan 2023-2028 strives to become the preeminent Catholic Liberal Arts, Science and Education University in Canada.

We are looking at how we can evolve our ongoing day-to-day fundraising efforts, engage Alumni in a manner not done in the past, and potentially launch a new comprehensive capital campaign in 2024 that will help us achieve our 2023 - 2028 strategic plan priorities and directions. A successful annual fundraising strategy will then in turn lead to a solid platform to launch a potential capital campaign in the future to accommodate the institution’s continual growth and development.
Background

**Our Vision:** St. Mary’s University will be a leader in post-secondary education, open to all, and focused on developing the whole person: mind, body and spirit. Founded on the Catholic intellectual tradition, St. Mary’s will prepare its students to live with integrity, compassion and confidence.

**Our Mission:** Through the pursuit of knowledge and service to the community, we prepare our students to become lifelong learners, engaged citizens and compassionate members of society.

**Who we are:**

The original St. Mary’s College Act received Royal Assent on September 18, 1986. On June 16, 2004, St. Mary's College officially became St. Mary’s University College and was authorized to grant its own Bachelor of Arts (BA) degrees. St. Mary’s University (StMU) is an innovative teaching and research university that provides affordable, accredited and highly valued degrees in Liberal Arts, Sciences and Education.

Located on a historic site in Calgary, Alberta, StMU inspires students to combine academics with a passionate commitment to ethics, social justice and respect for diversity of opinion and belief. St. Mary’s has 1025 full and part-time students, 80 full and part-time faculty, and an average class size of 25.

St. Mary’s is open to all, and focused on developing the whole person: mind, body and spirit. Founded on the Catholic Intellectual tradition, St. Mary’s will prepare its students to live with integrity, compassion and confidence. Through the pursuit on knowledge and service to the community, we prepare our students to become lifelong learners, engaged citizens and compassionate members of society. St. Mary’s is a centre of knowledge with a library that holds extensive collections in many key areas and a Centre for Learning, Access and Student Success dedicated to helping students become successful learners. The campus is an engaging gathering place where all are invited to join in events such as Speakers Series, Eucharistic celebrations, social justice campaigns, drama and choral performances and a variety of festivals and academic symposiums.
Background

What we offer:

St. Mary’s University offers eight Bachelor of Arts degrees, a Bachelor of Science degree, a Bachelor of Education after degree and transferable university courses in 35 academic disciplines. St. Mary’s is accredited to offer four three-year Bachelor of Arts degrees with concentrations in General Studies, English, History, or Psychology. As well as five four-year degrees: a Bachelor of Arts with a major in English, a Bachelor of Arts with a major in Psychology, a Bachelor of Arts with a major in Liberal Studies, a Bachelor of Arts with a major in History, a Bachelor of Arts with a major in Social Justice & Catholic Studies as well as a Bachelor of Science with a major in Biology. And see our after-degree Bachelor of Education (Elementary) Program.

For more information about St. Mary’s University please go to www.stmu.ca

About Working with St. Mary's University

We like to think we are an ambitious organization punching well above our “weight” – we have lofty goals and want to propel our institution to new heights. As much as we are ambitious, we are energetic in how we tackle challenges and professional goals in our work. We have a small, Fund Development team who bring these traits to their work as we roll out annual fund development and alumni engagement strategies throughout the University. They leverage their considerable expertise to raise funds and cultivate/steward our donors and alumni.

Every client has some challenges, and while we do our best, there are a few things you should know about working with us. We are a small independent institution that has a strong culture of consultation which often means there are many stakeholders to engage with along the way as outlined on the next page.
About Working with St. Mary's University

Current StMU stakeholders to engage with include:

- The successful proponent will be accountable to the President & Vice Chancellor, Dr. Sinda Vanderpool.
- The successful proponent may work directly with a small Steering Committee comprised of the President & Vice Chancellor, Fund Development staff, and the successful proponent's representatives.
- The President & Vice Chancellor will be consulted in high-level strategy and available for high-value donor relationship building opportunities and presentations.
- The President’s Council Team, which is comprised of the President & Vice Chancellor, all Vice Presidents and Assistant Vice Presidents will be informed of strategic level plans as we move forward. The President’s Council Team members can be available for relationship building and presentation purposes as appropriate.
- A Board committee named the Major Gifts Advisory council will be struck and comprised of a select group of Board of Governors, the President & Vice Chancellor, President's Council team as required, and a number of senior community volunteers. This Council has governance level review of strategic fund development efforts and will have no direct involvement in fund development activities. Some individuals may be willing to facilitate introductions or provide background information on donor prospects.
- The Board of Governors provides governance level review and will have no direct involvement in fund development activities. Some individuals may be willing to facilitate introductions or provide background information on donor prospects.
- The University Leadership Team is a large group comprised of the President Vice Chancellor, President’s Council Team, and all the Deans and Directors across the University. This group is to be informed of activities that will impact their work across the University and may be called upon as subject matter experts in development of fund development efforts and in donor relationships and presentations.
- Our fund development team serves diverse needs and is often pulled in multiple directions which means we have to make sure that all of our fund development activities align with our fund development strategy and institutional strategic plan. The internal team available to be integrated into the overall effort includes the Senior Development Officer, and a Manager, Donor Relations & Stewardship and Administrative Support.
- Given the nature of our institution, we need to demonstrate transparency, impact, and value when deciding on investments. We have to show how and what we are spending on any given initiative to advance our institution’s Vision and Mission.
4. Scope of Work

Service Specifics:

The successful proponent will be expected to work with the President and Vice Chancellor, the Vice President, Advancement (up to September 29, 2023), the Senior Development Officer, and the Manager Donor Relations & Stewardship, and Advancement team members, St. Mary's University President's Council and University Leadership, Board of Governors and future Campaign Cabinet to plan, and execute the strategic fund development plan. This includes Annual Fundraising, Major Gift Coaching and Fundraising, Campaign Readiness, Direct Solicitation and Ongoing Support.

Description of Services:

Major Gift Advising & Coaching to President & Vice Chancellor

- Identifying Cultivation and Solicitation opportunities
- In concert with Fund Development team, assistance with scheduling Philanthropic Discovery Sessions and Solicitations.

Major Gift Advising & Coaching to Board members engaged in Fundraising.

- Leadership and Direction on Day-to-Day Fundraising activity, as well as Major Gift targets and metrics for Fund Development Staff.
- Setting Priorities and timelines
- Reviewing Annual Goals and Metrics
- Overseeing prospect calls and follow ups.
- Overseeing and guiding Solicitation Schedule and timelines.
- Major Gift Prospect Identification and Management
- Determining existing and potential donor base and identifying major donor prospects developing a strong donor base from donors with intent and capacity to make major gifts.

Assist with Identifying necessary steps and strategies for Capital Campaign Readiness (which will largely be informed for Strategic Plan 2023-2028 in development).

Assist the President & Vice Chancellor and Fund Development Team to develop the Case/Proposal for a multi-million Capital Campaign for Board Approval at April 2024 Board meeting.

Assist Human Resources with Identifying Candidates for the Vice President, Advancement position.
Scope of Work

Proposed Content:

The following should be addressed in your proposal specific to the Project:

- Your vision and objectives for the project, as well as your understanding of the work to be undertaken;
- Your approach to the project;
- The proposed schedule of milestones, activities and duration;
- Presentation of formal reporting and other reporting metrics on proposal deliverables;
- Your expectations of the board, President & Vice Chancellor, and staff during the term of this consultancy;
- Your firm’s and consultants’ personal experience with similar projects, and his or her relevant qualifications and experience;
- Identify the project lead and key point of contact - i.e., the individual who will have the day-to-day responsibility.

5. Timeline:

The following timeline has been set for this RFP:

- RFP Issued: August 3, 2023
- Last Date for Questions: August 18, 2023 - 12:00 MST
- RFP Closing Date: August 25, 2023 – 9:00 a.m. MST
- Evaluations of Proposals: August 28, 2023, to September 1, 2023
- Interviews (if required): September 11 – September 15, 2023
- Contract Award (tentative): Week of September 18, 2023
- Project start date: To be decided upon award of contract. Ideally before the retirement of VP Advancement (September 29) but no later than October 2, 2023
- Project completion date: no later than January 31, 2024.
6. Submission Requirements

By submitting a proposal, the Proponent acknowledges that they have read and understand all procedures and requirements of the above references RFP and have complied fully with the general terms and conditions outlined in the RFP.

All costs to prepare the Proposal shall be borne solely by the Proponent.

In keeping with efforts to reduce environmental footprints, Proponents are required to submit their proposal with FUNDRAISING CONSULTANT as the subject line and in PDF format to the electronic address: careers@stmu.ca

Responses to this RFP must be received prior to the deadline. Late replies will not be considered.

Responses to the RFP must include the following:

Qualifications detail consisting of:

- Cover letter including statement of understanding regarding the requirements of this RFP
- Specific Project experience
- List of References (Minimum three)

Approach and Methodology consisting of:

- Describe how the scope of work outlined above might be completed and how challenges might be overcome.
- An outline of how you plan to work with St. Mary's University to achieve the Scope of Services.
- Overview of your preferred processes and approaches to support St. Mary's University's overall goals that may differ, or be in addition, to what has been described in the Scope for Services.
- Project Deliverables – please outline your approach.
- Project Schedule – Please outline your proposed process and provide an estimated schedule within the time frame outlines. Please identify any critical milestones.
- Collaboration – a clear outline of expected roles and responsibilities of the Project working group, staff, Fund Development team and the Fundraising Consultant.
- Cost quotation consisting of: an itemized fee schedule of the Scope of Work, including estimated sub-consultant fees, for the duration of the project, to be broken down by month and phase.

Please also outline any observed potential for deviations or additional fees.
Submission Requirements

Responses to the RFP must include the following - cont’d:

Also, please consider the following questions and be sure to clearly demonstrate your response in your proposal.

- How have you worked with a client with highly engaged internal stakeholders?
- How have you worked with clients who had their own internal teams and resources?
- Please describe your process of working with internal teams day in and day out
  - How does the relationship work?
  - How do you structure the partnership to ensure mutual success?
- How do you propose working with a client looking for high impact results but with constraints on spending?
  - Do you have any recent examples that you can demonstrate?
  - How has this worked for you in the past? If so, how did you manage the relationship?
- Describe what is specifically appealing to your firm about working with St. Mary’s University and how do you see the relationship evolving?
- Provide your agency’s standard timelines for services.

Mandatory Requirements

Agency profile and credentials, including:

- Name, titles, and hourly rates of individuals/partners who will be working on this project as well as the percentage of time for each individual for year one of the partnership. Note: Subsequent renewals will each be based upon an evaluation of the team being proposed, rates, and time allocations.
- Identify the company(ies) and/or individual(s) names of which your agency will be partnering or subcontracting with depending on the type of work, or workload,
- opresented by the University.
- Please provide an overview that includes your agency’s key competencies, areas of strength, and what makes your agency different from others.
Submission Requirements

Work portfolio:

Please submit two (2) samples of recently completed work. For each example you submit, please specify the following: nature of the work, the team involved, and clear success measurements (proof of impact). To the extent possible and without disclosing confidential information, please include an approximate budget for each sample. Please identify any subcontractors used and the work completed by each one.

Your examples should demonstrate the following:

- An example of a recent fundraising service placement for a Canadian post-secondary institution.
- An example demonstrating a strong emotive case for support, including messaging and communications.

Strict adherence to this Closing Date will be maintained and all Proposals received after this time and date will not be considered.

Proposals must be clearly titled to the attention of:

**Thérèse Takacs**
Vice President, Advancement
St. Mary’s University
14500 Bannister Road SE
Calgary, AB, T2X 1Z4

7. Contact During the RFP Process

Thérèse Takacs, Vice President, Advancement
14500 Bannister Rd. SE, Calgary AB, T2X 1Z4

Email: therese.takacs@stmu.ca Telephone: 403-254-3139
8. Proposal Evaluation

Work portfolio:

Evaluation Process: Evaluation Committee: Selection of the successful Proposal will be based on a decision by the President & Vice Chancellor and designates, consistent with the terms of the RFP. The evaluation will consider and recommend the Proponent whose proposal is most responsive to the University's needs and provides the best overall value to the University.

Proposal Responsiveness and Review: The specifications within this RFP represent the minimum performance necessary for response. Failure of the Proponent to provide any information requested in the RFP may result in disqualification of the Proposal and shall be the responsibility of the Proponent. The University reserves the right to make an award on receipt of initial Proposals. Proponents are encouraged to submit their most favorable Proposal at the Closing Date. All Proposals submitted in response to this RFP will be reviewed for responsiveness by the evaluation committee. Proposals requiring major revision in order to be eligible for award or otherwise not meeting the requirements specified in the RFP will be classified as noncompliant and rejected.

St. Mary's University reserves the right to seek response clarification with proponents to assist in making its evaluation.

Criteria and Evaluation: Utilizing the enclosed criteria, St. Mary's University will evaluate all responses with the intention of selecting the Proponent which best suits the requirements and needs of the University. The evaluation of the Proponent(s) will include, but are not limited to, the following criteria (weighed as indicated).

Requirements - Weighting (%)

- Quality of submission (20%): Completeness of documentation, understanding and acceptance of university requirements and context, and demonstrated interest in the opportunity.
- Proven experience (20%): Demonstrated post-secondary experience in provision of services required, three Canadian post-secondary references, experience of team involved in delivery of services, and years of operation.
- Alignment to organizational culture (20%): Evaluated through reference checks, interview(s), documented work style and approach, identified team members and backgrounds, and documented service delivery model.
- Support/Service (20%): Documented model of service and protocols, response times, clear identification of all team members, identification of any partners/sub-contractors, and relative time spent by each person/partner expressed as a percentage of time.
- Pricing (20%): Demonstrated value, return on investment, transparency, completeness of fee structure, mark-ups, admin expenses, and hourly rates disclosed for all team members involved.

Total 100
Proposal Evaluation

A numerical weight is assigned to each factor to create a total maximum score of 100. The evaluators' total scores for the Proposals will be used to reach a score which will be assigned to each Proposal.

**RFP Interview:** The evaluator may choose to hold discussions with Proponents determined to be most responsive in order to clarify requirements or Proposal offerings. Shortlisted Proponents will be contacted with applicable dates, times and meeting location. Clarifying adjustments may be made to Proposals and financial offerings.

Interviews may be scored, the short-listed Proponents will be advised prior to the interviews.

**Evaluation Factors**

Each response to this RFP must comply materially with the procedures described in RFP.

The selection of Proposals will be based on the maximum degree of compliance with the following criteria:

- Upon evaluation of all valid Proposals received, the University may select the Proposals that best meet the terms of this RFP and in the University's sole discretion, provides the best overall value to the University;
- Subject to the requirements of FOIP (Freedom of Information and Protection of Privacy Act), such ratings shall be confidential, and no totals or scores of such ratings shall be released to any party.

**Understanding**

It must be clearly understood that the University reserves the right at any time prior to the selection of the successful Proponent(s), at its sole discretion, to accept or reject in whole or in part, any or all responses received and/or withdraw RFP and is not bound to pursue any response to this RFP. As it is unknown what responses will be received in response to this RFP, the University cannot and does not make any representations that it will proceed with this Request for Proposal call:

- the University reserves the right, in the interests of the University, to waive any informality or irregularity in Proposals received.
- no act of the University, other than a notice in writing signed by a University signing officer, shall constitute an acceptance by the University of a Proposal.
9. General Terms and Conditions

Rights of St. Mary’s University

St. Mary’s University, as represented by its President & Vice Chancellor and Administration, reserves the right to:

- Seek clarification or obtain verification of any/all statements made in a Proponent’s proposal
- During the evaluation process submit questions or conduct interviews with Proponents, at the Proponents costs, upon forty-eight (48) hours’ notice, to seek clarification or verify any or all information provided by the Proponent in its Proposal
- Reject any or all Proposal received in response to this RFP
- Enter into negotiation with Proponents in order to arrive at the most cost-effective Contract that is in keeping with the terms and conditions of this RFP
- Accept any proposal in whole or in part without prior negotiation
- Cancel and/or reissue this RFP at any time
- Award one (1) or more Contracts
- Keep, for the University’s records, all proposal and documentation submitted in response to this proposal.

General Compliance with Laws

The fundraising consultant shall comply with all federal, provincial, and municipal laws.

Proposed Validity period

The proposal shall be unconditional, irrevocable, and open to acceptance by the University at any time no less than sixty (60) calendar days after the date on which the RFP closes.