



Request for Proposals

Fund Development Plan for ACCT 2024-2027

Summary

This document requests proposals from fund development consultants for the development of a multi-year Fund Development Plan (July 2024 - December 2027) for the Action, Chinese Canadians Together (ACCT) Foundation. Please carefully review the information and requirements in this Request for Proposals (RFP) and address any questions to the contact at the ACCT Foundation noted below.

RFP Delivery Instructions and Deadline

All submissions should be in electronic format and sent to the email address: events@acctfoundation.ca on or before December 22, 2023. The receipt of submissions will be confirmed to the sender via email. The ACCT Foundation may contact submitters for clarifications or further information on the proposals.

Notification of the successful proposal in this RFP process will be made on or before January 8, 2024. All proposals will remain confidential between the submitter and the ACCT Foundation.

Contacts

For enquires on the ACCT Foundation and this RFP, please contact:

<p>Teresa Woo-Paw Chair The ACCT Foundation Email: t.woo-paw@acctfoundation.ca</p>	<p>Kenneth Fung Program Manager The ACCT Foundation Email: k.fung@acctfoundation.ca</p>
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For more information on the ACCT Foundation, please visit: <https://acctfoundation.ca/>

November, 2023



I. Introduction

The ACCT Foundation is a non-partisan non-profit organization that builds the capacity of Chinese Canadian leaders committed to creating a more equitable society in Canada. Since its establishment in 2017, the ACCT Foundation has increasingly been recognized by the government, funders and the wider society as a credible national organization in advancing Chinese Canadian civic engagement and leadership development, and furthering education on racial equality of minorities. The ACCT Foundation has an annual operational budget of around \$250,000.

While having built a solid foundation of work in the past few years, the ACCT Foundation is at a critical stage of development that requires further strengthening of its organizational capacity for carrying out its vision and mission. As such, the ACCT Foundation is engaging in an organizational capacity development initiative comprising the updating of its strategic plan, development of a fund development plan, marketing and communications plan and I.T and support systems plan.

This RFP is for the creation of a Fund Development Plan for ACCT in 2024-2027. The plan will recommend strategies, measures and implementation plan for fund development for ACCT, including a list of potential funding sources for ACCT's consideration. The Fund Development Plan will form an integral part of the overall organization capacity development planning process.

II. Scope

The ACCT Foundation will work with consultants to build a fund development and sustainability plan which will include the following objectives:

- Conduct a practical assessment and analysis of the ACCT's current fundraising program, capacity and outcomes
- Identify best practices in fund development which should be incorporated into a multi-year fund development strategy
- Develop an actionable and strategic multi-year fund development plan, which will assist in the diversification of the ACCT's funding base to ensure the long-term sustainability of the agency's program

III. Project Outline and Deliverables

1. Fund Development Plan

The consultant is required to create a customized plan for the ACCT Foundation. Specific requirements, contents and deliverables to be included in the written Fund Development Plan are as follows:

- Review of current fund development strategies, activities, capacity and outcome
- Fundraising goals and objectives
 - Work with the Board and related stakeholders to determine the fundraising goals of ACCT
 - Recommend realistic and achievable yearly fund development targets
- Funder/donor analysis and segmentation
 - Identify key opportunities for fund development as well as challenges
 - Recommend a list potential of funders/donors for ACCT Foundation
- Fundraising strategies & tactics
 - Facilitate ACCT Board discussion on fundraising strategies and tactics
 - Recommend fund development strategies and tactics and the mix and timing of specific campaign types
- Action plan
 - Develop an action plan for fund development and a preliminary time table for various fund development activities for 2024-2027
- Capacity building
 - Make recommendations on how to develop the fund development capacity of staff members
- Donor cultivation and management
 - Recommend on how ACCT should cultivate and maintain its existing and potential donors
- Monitoring and evaluation of fundraising activities
 - Recommend on how ACCT should monitor and evaluate its fundraising activities for efficiency and effectiveness
- Budget and resources requirements
 - Recommend the required yearly fund development budget to successfully implement the plan
 - Recommend other resources required for implementing the fund development plan, e.g. donor management and campaign software, specific human resources.

- Financial sustainability
 - Make recommendations on longer-term financial sustainability of the ACCT Foundation
- Ethical and legal considerations
 - Suggest major ethical and legal considerations related to fund development activities

2. Stakeholder Communication and Engagement

After the completion of the written Fund Development Plan, the consultant is required to engage in related follow-up activities, including the following:

- Report back to ACCT Board on the recommendations
- Communicate with ACCT staff members on the recommendations
- Participate in meetings related to the integration of various plans under the overall ACCT organization capacity development planning process
- Training to Board members and staff on enhancing fund development capacity

IV. Proposal Requirements

In creating a response to this request for proposals, the consultant should carefully consider the fund development opportunities and challenges represented by the unique mandate, scope and constituencies of the ACCT Foundation.

Proposals should clearly demonstrate the consultant understands ACCT's requirements and outlines the methods by which the consultant proposes to create this Fund Development Plan.

At a minimum, the proposal should include:

- An **understanding** of the unique nature and scope of the ACCT Foundation
- A description of the **experience** of the consultants and/or consultant's firm with fund development and advising the design and implementation of comprehensive fundraising campaigns with organizations like the ACCT Foundation
- **References** for the company and individuals who will be involved in the creation of the plan
- If possible, provide **examples of previous written work** similar to the scope of the work under this RFP. Identifying information may be redacted if necessary.
- **Work Plan:** The proposed methodology, detailed timelines, milestones and activities of the consultant in creating the plan, including earliest start date and projected completion date



- An estimate of the time and requirements that the consultant will require of the ACCT Foundation to support the consultant’s creation of the plan
- **Service fee:** A detailed quote for the consultancy with breakdowns along with a proposed payment schedule tied to project milestones and/or deliverables.

V. Timeline:

- Development and writing of the Fund Development Plan: January – March 2024
- Stakeholder communication and engagement: April – May 2024

VI. Proposal Evaluation:

Proposals submitted in response to this RFP will be evaluated according to the following criteria:

- Cost/benefit to the ACCT Foundation
- Consultant/firm relevant experience and qualifications
- Scope of work and detailed work plan
- Compliance with proposal requirements
- Value-added or Innovativeness