



nelson
CARES
society

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Request for Proposal Fundraising Consultant Capital Campaign Development WARD STREET PLACE

Deadline for Submission: January 20, 2012

**FUNDRAISING CONSULTANT for Capital Campaign
Nelson CARES Society
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REQUEST FOR PROPOSAL
FUNDRAISING CONSULTANT for a Capital Campaign

Proposals addressed to Nelson CARES Society, Leisa Talbot, Office Manager,
521 Vernon Street, Nelson British Columbia or emailed to info@nelsoncares.ca will be received
until 5:00 p.m. on January 20, 2012.

SECTION 1: PURPOSE

Nelson CARES Society is requesting submissions from fundraising consultants interested in developing and managing a Capital Campaign to raise the money needed to retro-fit Ward Street Place, a mixed use low income rental housing and commercial real estate building in downtown Nelson British Columbia. The amount needed is estimated to be between \$300,000 and \$370,000 see budget (Section 4).

The campaign will be developed between February- July 2012 and launch in September 2012 to coincide with the 100th anniversary of the building.

The organization's Board of Directors envisions a time specific strategic Capital Campaign Plan.

The purpose of this Request for Proposal is to retain a Fundraising Consultant who will:

- 1) design a campaign plan
- 2) manage the implementation and launch of the campaign
- 3) track progress and ensure the campaign remains a priority for the organization

PHASE 1 -Campaign Assessment and Plan (February 6 – March 31, 2012)

- Conduct confidential interviews with key prospects in the community and region.
- Refine internal capacity and needs including staff and volunteer requirements.
- Develop campaign plan and calendar.
- Support development of a case statement.
- Identify prospective Capital Campaign Committee members
- Work with Board and Capital Campaign Committee to develop the budget.
- Board, volunteer and staff education and training.
- Solicit pro bono architectural drawings for the project

PHASE 2 -Campaign Materials (April 1 to June 30, 2012)

- Work with architect and graphic designer to develop collateral materials for launch of the Capital Campaign.
- Identify donors by constituency, create individual Donor Packets.
- Set goals (Gift Charts), develop fundraising strategy and timing.
- Donor stewardship and cultivation.
- Donor recognition and naming opportunities.
- Develop Capital Campaign relationship with organizational fundraising.
- Develop campaign events.

PHASE 3 -Campaign Management (July 1, 2012 – to Completion)

Focus on active cultivation and solicitation of major gift prospects.

Assist with proposals to national foundations and corporations.

Manage the public information and public relations plan.

Launch public campaign in conjunction with 100th anniversary of Ward Street Place.

Track results and maintain campaign momentum.

SECTION 2: Organizational Profile

Nelson CARES Society envisions a healthy and inclusive community where complete respect for all individuals is an ordinary, everyday occurrence.

Established in 1974 Nelson CARES Society is a multi-service charitable organization that delivers programs in the following areas: emergency shelter for the homeless, affordable housing, residential and employment services for adults with developmental disabilities, advocacy services for people living in poverty and a youth environmental program. The annual budget is \$3.5 million; there are a total of 90 full-time, part-time and casual staff.

Nelson CARES Society is accredited through CARF International.

Funding for the programs include BC Housing, Community Living BC, the Law Foundation of BC, Human Resources and Development Canada as well as various other local and regional funders for short-term projects.

Mission

Through community collaboration and service excellence, Nelson CARES Society works toward a socially just society by providing programs and initiatives in advocacy, housing, employment, support services, and environmental stewardship. Nelson CARES Society aims to be a reflection of the community it envisions.

Ward Street Place currently operates 34 affordable Single Room Occupancy (SRO) units and 3 affordable self-contained one-bedroom units with support component in accordance with RTA. As well Stepping Stones for Success, a 19 bed emergency shelter, is located in the basement of the building. **Ward Street Place is the last stock of affordable housing in downtown Nelson.** Nelson CARES Society is committed to maintaining and increasing affordable housing in the Nelson area.

SECTION 4: Project Vision

Nelson CARES Society sees the re-development of Ward Street Place and an opportunity for the community to support the work of the society and to embrace refurbishing and preservation of a beautiful heritage building.

Ward Street Place sits in the heart of downtown Nelson British Columbia. It is a 10,000 square foot mixed use site that offers low rental accommodation and commercial street level tenancy. It will celebrate its 100th anniversary in 2012 and Nelson CARES wants to ensure that it remains a safe and beautiful building for decades to come.

The campaign funds will be used to refurbish the façade of this center-piece downtown building; upgrade electrical and fire prevention systems and some internal finishes will be completed by 2014-15.

Despite current economic challenges the Board of Directors believes that now is a unique and ideal time to launch a capital campaign to fund our important work while financially strengthening the organization for its future effectiveness.

Nelson CARES Society Board of Directors has identified the following strategic priorities:
“To provide a home to the homeless, a voice to the voiceless and to foster a sense of community by providing safe and supportive affordable and emergency housing.”

Ward Street Place is the last stock of affordable housing in downtown Nelson. Rental costs are high and the vacancy rate is the lowest in the province at 1.8%.

SECTION 4: Preliminary Costing

A summary draft business plan for the development of the project is as follows:

Re-fit Costs (BASED on JTW Consulting Report 2011)	BUDGET
Planning and Project Management	\$ 29,500
Exterior Windows and Doors	\$ 78,000
Flooring	\$ 69,000
Interior Painting	\$ 30,000
Fire Prevention Systems Sprinkler	\$ 55,000
Fire Prevention Systems – Alarm Upgrade	\$ 45,000
Fire Prevention- doors and door closures	\$ 23,500
Electrical Upgrades	\$ 40,000
Subtotal: WSP Retro-fit	\$ 370,000

SECTION 5: Submission Elements

Nelson CARES Society is seeking proposals from qualified development/fundraising consultant individuals, to assist in its fundraising efforts, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).

The proposals received will be evaluated for the most suitable approach in terms of value and costs, and for best fit with the circumstances and context of the Nelson CARES requirement and working environment. The successful proposer will be awarded a professional services contract in accordance with Nelson CARES’ established contracting procedures.

Total value of the contract will be negotiated with successful incumbent.

Deadline for submission: January 20, 2012

Elements to be included:

- **EXPERIENCE AND REFERENCES**
- **APPROACH TO THE PROJECT**
- **IMPLEMENTATION PLAN**
- **TOOLS TO TRACK CAMPAIGN**
- **COSTS**