



Request for Proposal What Canadian Donors Want 2020

PURPOSE OF THE RFP

Through this Request for Proposal (“RFP”), the AFP Foundation for Philanthropy - Canada seeks proposals from qualified firms to develop and implement the What Canadian Donors Want study in 2020, and we anticipate that this work will continue for future iterations of the biennial study.

BACKGROUND

The AFP Foundation for Philanthropy - Canada was created in 1998 to help fulfill the mission of the Association of Fundraising Professionals (AFP), previously the National Society of Fundraising Executives: Advancing philanthropy through education, advocacy and training in Canada.

Purposes

The AFP Canadian Foundation works:

- To educate the general public in the fields of fundraising and philanthropy by carrying out educational programs, including seminars and conferences and by offering scholarships, bursaries and loans to individuals wishing to attend such educational programs; and
- To promote research in the fields of fundraising and philanthropy by providing funds to other registered charities to carry out such research and by assisting in the dissemination of the results of such research to the general public.

AFP Foundation for Philanthropy-Canada’s Research Committee has become an important force in supporting the development of Canadian research and research capacity in fundraising. In addition, the Committee commissions the flagship What Canadian Donors Want study.

About What Canadian Donors Want

Launched by the AFP Canadian Foundation in 2011 as a biennial online survey of Canadian donors. The purpose of the Study is to understand donor views on charities and their donation behaviour and to provide facts and actionable insights for charities and fundraisers to use in their jobs. The Survey results and supporting documentation are available free of charge to the general public. (<https://afpglobal.org/afp-foundation-philanthropy-canada-releases-biennial-survey-what-canadian-donors-want>)

The release of the next iteration of What Canadian Donors Want is scheduled for the first quarter of 2021. The study will look at:

- [Changing Giving Habits](#)
- [Donor Confidence and Charity Management](#)
- [General Social Media Use](#)
- [Giving and Volunteer Levels and Behavior](#)
- [How and Why Canadians Give](#)
- [How the Sector Should Be Funded](#)
- [Segmentation](#)

We will also consider additional avenues of study as the survey evolves.

SCOPE OF WORK

The AFP Foundation for Philanthropy - Canada What Canadian Donors Want Working Group is seeking a market research partner to:

- Develop themed and actionable survey questions, building off of our established questionnaire.
- Identify nationally representative respondent pool (must be prior Canadian Donors) and obtain statistically significant responses that have geographic breadth and demographic depth
- Prepare an easily digested Report for public release with supporting themed fact sheets
- Provide a dynamic dashboard for members to interact with the data visualizations (ex. Power BI or Tableau)
- Participate in the Working Group's consultation process and support the Working Group's dissemination efforts

TIMELINE

Questions Finalized – July 2020

Launch Survey – October 2020

Release Results – January 2021

Webinar – January 2021

PROPOSAL SUBMISSION REQUIREMENTS

Proposer is responsible for preparing an effective, clear, and concise proposal. The proposal must be valid and enforceable for a minimum 90-day period.

Each firm wishing to respond must submit their proposal in an electronic format by no later than 12:00 midnight eastern time on December 31, 2019 to lori.gusdorf@afpglobal.org.

Required Information

- **Cover Letter** stating the company's name, address, telephone number and email. The letter must be signed by a company representative authorized to bind the company contractually. The signature on the cover letter will serve as acknowledgement that the company is willing to enter into an agreement with the AFP Foundation for Philanthropy - Canada and will comply with all terms and conditions set forth in this solicitation if the company's proposal is accepted.

- **Profile of Firm** that provides biographies that include education, licenses, and experience for each person who would be assigned tasks to perform for the AFP Foundation for Philanthropy - Canada. Describe experience and qualifications which qualify the individual to perform consulting services specified within the Scope of Work.
- **Conflict of Interest.** Please identify any conflict of interest that may arise as a result of business activities or ventures by your firm and associates of your firm, employees, or subcontractors because of any individual's status as a member of the board of directors of any organization likely to interact with AFP Foundation for Philanthropy – Canada, AFP Canada or AFP.
- **Writing/Report Samples** for individuals who would be providing written reports or other materials.
- **References** should include those for which services have been provided within the past three years. Please include a contact name and telephone number.
- **Proposed Services Narrative.** Write how you propose to undertake the Scope of Work. Address (at least) the following subjects:
 - Understanding of the requirements
 - Technical approach and proposed work plan for the required services
 - Technical capabilities in terms of personnel, equipment and materials; management plan, including staffing of key positions, methods of assigning work and procedures for maintaining level of service, etc.
 - Identify any subcontractors or if a joint venture is proposed. If a joint venture or any subcontractor is proposed that would perform 10% or more of the work, a profile of the firm or individual should be submitted.
- **Price Proposal.** Provide fees for:
 - Survey Development
 - Survey Implementation/Data Collection
 - Data Interpretation (in conjunction with WCDW working group)
 - Preparation of written report and fact sheets
 - Webinar support as needed
 - Any other charges

SELECTION PROCESS

AFP Foundation for Philanthropy – Canada reserves the rights to reject any or all proposals, to waive informalities in the RFP process, or to terminate the RFP process at any time, if deemed to be in the best interests of the AFP Foundation for Philanthropy - Canada. The AFP Foundation for Philanthropy – Canada reserves the right not to award a contract pursuant to this RFP.

Any company submitting a proposal that is presently debarred, suspended, in the process of debarment, declared ineligible, or voluntarily excluded from participation in transactions by any federal or provincial department or agency is automatically excluded from participating in this process and the company’s proposal will be rejected.

EVALUATION AND SELECTION

Each proposal received will be evaluated and a determination will be made if it meets the minimum requirements. Failure to meet these requirements will be a cause for eliminating the proposal from further consideration. Evaluation of the proposals will be made by an AFP Foundation for Philanthropy – Canada staff and volunteer panel.

Evaluation Criteria:

- Professional capacity to undertake the Scope of Work
- Proposed fee structure
- Ability to perform within time and budget constraints
- Evaluation of potential work plans
- Previous experience presenting data using clear and concise visualizations
- Team credentials
- Experience with charitable sector
- National in scope
- Bilingual capability given preference
- Recommendations by references
- Firm minority status and affirmative action and diversity program or activities, environmental commitments and community involvement
- Other pertinent information submitted

Selection Timeline:

Event	RFP Issued	Intent to Respond and Questions Due	Answers Provided	Proposals Due	Presentations/ Demos
Date	Mon, Nov 4	Fri, Nov 15	Fri, Nov 22	Tues, Dec 31	January 2020

For additional information contact: Lori Gusdorf, Executive Vice President, AFP Foundations for Philanthropy, lori.gusdorf@afpglobal.org