

Request for Proposal (RFP)

Legacy Place Society — Fundraising Services for Central Alberta Endowment Campaign

RFP Issued	June 24, 2026
Questions Deadline	12:00 PM on July 6, 2026
Proposal Closing	12:00 PM on July 31, 2026
Consult and provide recommendation to the Board	By August 14, 2026
Anticipated Start	August 17, 2026
RFP Contact	Diana Festejo Legacy Place Society Phone: 1-403-813-8019 Email: diana.festejo@legacyplacesociety.com

1. Invitation

Legacy Place Society (LPS) invites proposals from qualified fundraising professionals or firms to plan and execute a comprehensive fundraising campaign to establish an endowment fund supporting Legacy Place Society’s services and facilities in Central Alberta.

Why it matters: When first responders are supported, entire communities benefit. This endowment is more than a financial goal, it is a commitment to stand behind those who stand for us, recognize the human cost of service, and build a lasting legacy of care, resilience, and respect for Central Alberta’s first responders and their families.

2. Organization Background

Legacy Place Society is a non-profit registered charity (#891549420RR0001) dedicated to supporting first responders and military across Alberta, including fire, police, EMS, and related services. First responders routinely encounter crisis, trauma, and operational stress that can lead to burnout and mental health challenges. Legacy Place Society exists to ensure those who protect our communities have specialized, accessible supports and a place to turn when they need support.

3. Purpose of the RFP and Project Overview

Purpose of the RFP: Legacy Place Society is seeking proposals from qualified fundraising professionals or firms to design and execute a fundraising campaign to establish a \$1,000,000 endowment fund.

Endowment purpose: The endowment will provide sustainable, long-term funding to support:

- First responder assistance programs
- Mental health and recovery support
- Operations and accessibility of the respite house located in Red Deer, Alberta
- Ongoing program delivery for first responders across Central Alberta

3.1 Case for Support (Summary)

Every day, first responders across Central Alberta answer the call in moments of crisis, trauma, and uncertainty. Over time, repeated exposure to these events can create operational stress injuries, burnout, and other mental health challenges. Legacy Place Society provides first responder-specific supports for recovery and resilience, including peer-informed and community-based assistance programs and a dedicated respite house in Red Deer, Alberta, offering a safe, restorative environment for healing and renewal.

To ensure these services are available not only today but for decades to come, Legacy Place Society is establishing a \$1,000,000 endowment fund. The endowment is intended to provide stable, long-term funding for programs and services, support ongoing operation and accessibility of the respite house, enable the organization to respond to evolving needs, and reduce reliance on year-to-year fundraising, creating a lasting legacy of care, resilience, and respect for those who serve.

Why it matters: When first responders are supported, entire communities benefit. This endowment is more than a financial goal, it is a commitment to stand behind those who stand for us, recognize the human cost of service, and build a lasting foundation of care, resilience, and respect.

LPS anticipates that the endowment will be administered by an established community foundation or financial institution. Proponents should be prepared to coordinate with LPS and any third-party endowment administrator, as applicable.

4. Scope of Work

The selected proponent will lead and execute a fundraising campaign, including direct solicitation of donors, to achieve the endowment goal. Responsibilities are expected to include the items below (proponents may recommend refinements based on their approach).

Anticipated term: The initial term of engagement is expected to be twelve (12) months, with an option to extend based on performance, campaign needs, and mutual agreement.

- Develop a comprehensive fundraising strategy specific to an endowment campaign.
- Create or refine a compelling, donor-ready case for support and key campaign messaging (including materials such as a case statement, pitch deck, and donor briefs) that clearly communicates the need for first responder-specific supports, the role of the Red Deer respite house, and the long-term impact of the \$1,000,000 endowment.
- Develop revenue projections, fundraising targets, and goal-setting frameworks to guide campaign planning, pacing, and performance measurement.
- Identify, qualify, and prioritize donor prospects (major donors, corporate partners, foundations and philanthropic organizations).
- Directly solicit donations, including leading or co-leading donor meetings, securing major gifts, and supporting closing strategies.
- Work collaboratively with LPS leadership, specifically the LPS Alberta Central Endowment (ACE) committee to engage stakeholders, activate existing relationships, and support board members in donor outreach.
- Develop and implement donor stewardship and recognition, naming and legacy giving opportunities, and campaign communications/messaging.

5. Special Considerations

5.1 Trauma-Informed and Respectful Engagement

Proponents must demonstrate the ability to engage respectfully with individuals connected to first responder communities and to communicate sensitive topics (including mental health, recovery, and trauma) with professionalism, empathy, discretion, and respect for privacy.

5.2 Place-Based Fundraising (Central Alberta)

The campaign should reflect a strong understanding of Central Alberta communities, including the significance of LPS's respite house in Red Deer and regional donor networks and opportunities.

5.3 Endowment-Focused Strategy

Proponents should demonstrate experience structuring and marketing endowment funds, communicating long-term impact and legacy giving, and motivating donors to invest in permanent, sustainable support.

6. Deliverables and Reporting

At minimum, the successful proponent will be expected to provide the following deliverables to support campaign execution, milestone tracking, and progress toward fundraising targets:

- Campaign strategy and implementation plan, including timelines and targets.
- Revenue projections, fundraising targets, and goal-setting framework, including campaign pacing assumptions and performance measures.
- Case for support and campaign messaging package (donor-ready), including recommended core narrative, key messages, and supporting materials (e.g., case statement, pitch deck outline, donor briefing templates).
- Prospect identification approach and engagement strategy.
- Regular (e.g., monthly) activity and progress reports.
- Documented donor interactions suitable for organizational continuity, including timely entry of contact reports, next steps, and supporting notes in LPS's CRM (or in an agreed tracking tool with regular export). All donor lists, prospect research, contact reports, CRM notes, and related records created or updated during the engagement will be the property of LPS and must be provided to LPS in a usable format upon request and at the end of the engagement.
- Final campaign report summarizing funds raised, commitments secured, and recommendations for ongoing stewardship.

7. Proponent Qualifications

- Demonstrated experience leading and delivering successful major gift and/or capital campaigns, ideally including endowment fundraising.

- Experience with donor prospecting, cultivation, solicitation, and stewardship, including direct donor asks.
- Understanding of, and ability to represent, a mission supporting first responders and military and mental health initiatives.
- Ability to work effectively with Boards and senior leadership, including coaching and enabling volunteer solicitors.
- Knowledge of ethical fundraising practices and confidentiality expectations appropriate to sensitive services.
- Preference may be given to proponents with strong Central Alberta relationships or a proven plan to build them.

8. Proposal Submission Requirements

Submission method: Proposals must be submitted via email to the RFP Contact identified on the cover page. Proposals should be attached as a single PDF (preferred) or a Word document. The email subject line should include “LPS Fundraising RFP [Proponent Name]”.

Late proposals will not be accepted. Proposals must be received by Legacy Place Society by the Proposal Closing date and time indicated on the cover page. For email submissions, the time of receipt will be determined by the timestamp on the email as received by LPS (local time).

Proposals should be clear, concise, and include the following information:

1. **Cover letter** including primary contact information.
2. **Firm/consultant profile** including relevant experience and team members who will work on this assignment.
3. **Approach and methodology** including how you will: develop campaign strategy; establish revenue projections, fundraising targets, and goal-setting framework; identify and prioritize prospects; conduct donor asks; and partner with LPS leadership/Board.
4. **Work plan and timeline** (include key milestones for the first 90 days and for the full campaign).
5. **Relevant project examples** (2–3) including outcomes (targets, funds raised, timeline, your role).
6. **References** (minimum 2).
7. **Fee proposal** with a detailed cost breakdown (see Section 10).
8. **Assumptions and requirements** (what you will need from LPS to be successful).

9. **Risk management** including how you will manage confidentiality and sensitive donor/community interactions.

9. Evaluation and Selection Process

LPS will review proposals to select the proponent that offers the best overall value, considering qualifications, proposed approach, and cost. LPS may invite one or more proponents to an interview or presentation.

Evaluation Criteria	Weight
Relevant fundraising and endowment campaign experience	20%
Proposed approach, methodology, and work plan	20%
Ability to conduct direct solicitations and close gifts	20%
Understanding of LPS mission and trauma-informed engagement	20%
Reporting, progress tracking, and collaboration with staff/Board	5%
Fees and overall value	15%

10. Compensation and Ethical Fundraising

Proponents must submit a detailed fee structure, which may include fixed fees, retainer models, and/or milestone-based payments. Legacy Place Society will not consider proposals based on a percentage of funds raised, in alignment with ethical fundraising standards.

Proponents must comply with all applicable laws and professional standards related to fundraising and solicitation activities, including (as applicable): Alberta's Charitable Fund Raising Act and the Charitable Fund Raising Regulation, including any Standards of Practice established under the Act; and federal requirements applicable to registered charities under the Income Tax Act (Canada), including Canada Revenue Agency guidance on fundraising by registered charities.

11. RFP Schedule (Anticipated)

Milestone	Date/Time
RFP issued	June 24, 2026
Deadline for questions	12:00 PM on July 6, 2026
Addenda issued (if required)	July 13, 2026
Proposal closing	12:00 PM on July 31, 2026
Interviews (if required)	Week of August 3-6, 2026
Anticipated award / notification	August 7, 2026 (Pending Contract Approval)
Consult and provide recommendation to the Board	Before August 14, 2026
Anticipated project start	August 17, 2026

12. Terms and Conditions

- **Right to accept/reject:** LPS reserves the right to accept or reject any or all proposals, to waive irregularities, and to cancel or reissue this RFP at any time.
- **Costs:** Any costs incurred by proponents in preparing or submitting a proposal are the sole responsibility of the proponent.
- **Confidentiality and donor information:** Proponents must keep information obtained through this RFP process and all campaign-related information confidential. This includes donor/prospect identities, giving history, contact information, health or other sensitive personal information, and any internal strategies. Proponents must use secure methods for storing and transmitting data, restrict access on a need-to-know basis, and immediately notify LPS of any suspected or actual privacy incident involving LPS information.
- **Conflict of interest:** Proponents must disclose any actual or potential conflicts of interest, including current or recent engagements that could reasonably be viewed as competing for the same donor pool, corporate sponsors, or foundation funders. Proponents must also disclose any financial or other interests that could influence their advice. The successful proponent will be expected to avoid conflicts during the engagement and to implement mitigation measures as requested by LPS. Donor/prospect information and relationships obtained through LPS may not be used for any purpose other than this engagement, and the proponent must not solicit LPS donors/prospects for other clients using information learned through LPS.

- **Negotiation and contracting:** LPS intends to negotiate scope, deliverables, schedule, and terms with the preferred proponent prior to final award.
- **Insurance and background checks:** The successful proponent may be required to provide proof of applicable insurance coverage (e.g., commercial general liability and/or professional liability/errors and omissions) prior to commencing work. Where the engagement involves access to sensitive information or direct interaction with vulnerable individuals or clients, LPS may require background checks for individuals assigned to the project, consistent with applicable law and LPS policies.
- **Ownership of materials:** Unless otherwise agreed in writing, campaign materials created for LPS will be owned by LPS upon payment.
- **Proposals will be evaluated by the Legacy Place Society Board of Directors (LPS) using the criteria and weighting set out below. LPS may, at its sole discretion, shortlist one or more Proponents for interviews, presentations, or clarification. of their submissions. Submission method: Proponents can either mail to: 264219 RR14 Rocky View County b t4b 3l5 or email to Diana Festejo at diana.festejo@legacyplacesociety.com**
- **Proponents are cautioned that the Closing Deadline is based on when the Proposal is received by LPS, and not when a Proposal is submitted by the Proponent. It is the sole responsibility of the Proponent to be mindful of the length of time for the Proposal to be transmitted due to file transfer size, transmission speed, etc., and LPS shall not be responsible for any delivery issues whether or not caused by the LPS server.**
- **Questions: Direct questions in writing to the Legacy Place Society RFP Contact by 12:00 PM on July 6, 2026 to Diana Festejo at diana.festejo@legacyplacesociety.com**
- **LPS may respond by addendum and may share questions/answers with all Proponents (without identifying the Proponent).**

13. Appendices (Optional)

The following appendices are provided to support consistent proposal submissions. Proponents may use their own formats; however, use of these templates is encouraged.

Appendix A — Proposal Submission Form

Proponent legal name	[Insert]
Primary contact	Name: [Insert]
	Title: [Insert]
	Email: [Insert]

	Phone: [Insert]
Address	[Insert]
Business number / GST	[Insert if applicable]
Proposed start date	[Insert]
Proposal validity period	[e.g., 90 days]

Appendix B — Pricing and Fee Proposal Template

Provide a clear fee model and detailed breakdown. Fees should be presented as fixed fees, retainers, and/or milestone-based payments. Percentage-based compensation tied to funds raised will not be considered.

Fee component	Rate / amount	Notes / inclusions
Discovery, assessment, and campaign planning	[Insert]	[Deliverables, hours assumptions, etc.]
Major gift cultivation and solicitation (ongoing)	[Insert]	[Cadence, meeting targets, reporting, etc.]
Campaign materials (case for support, decks, donor briefs)	[Insert]	[What's included; revision rounds]
Board/staff coaching and training	[Insert]	[Format; number of sessions]
Estimated expenses (travel, materials, etc.)	[Insert]	[Billing rules; caps; receipts]
Total proposed cost (estimate)	[Insert]	[Assumptions]

Appendix C — Work Plan and Timeline Template

Provide a work plan showing how you will move from campaign planning to active solicitations and stewardship. Include the first 90 days in greater detail and show the overall campaign timeline to reach the endowment goal.

Phase	Timing	Key activities	Key outputs
1. Discovery & readiness	Weeks 1–4	[Insert]	[Insert]
2. Strategy & case	Weeks 3–8	[Insert]	[Insert]

3. Prospecting & pipeline	Months 2–4	[Insert]	[Insert]
4. Active solicitations	Months 3–18	[Insert]	[Insert]
5. Stewardship & close-out	Months 12–24	[Insert]	[Insert]

Appendix D — Relevant Experience Template (2–3 Examples)

- **Client/organization:** [Insert]
- **Campaign type:** [Endowment / capital / major gifts / other]
- **Goal and outcome:** [Target vs. raised/committed]
- **Timeline:** [Insert]
- **Your role:** [Lead consultant/solicitor/coach/etc.]
- **Relevant notes:** [e.g., donor types, geography, sensitive populations]

Appendix E — Reference Template

Reference name	[Insert]
Organization	[Insert]
Title/relationship	[Insert]
Email	[Insert]
Phone	[Insert]
Project referenced	[Insert]

Appendix F — Contracting Checklist (Key Terms)

- **Term of engagement:** Twelve (12) months with an option to extend (subject to mutual agreement).
- **Scope and deliverables:** aligned to Sections 4 and 6 of this RFP
- **Roles and responsibilities:** consultant vs. LPS leadership/Board
- **Reporting cadence:** [monthly/biweekly], format, and expectations for reporting against goals, targets, milestones, and donor activity
- **Confidentiality and privacy:** donor data handling, secure storage, need-to-know access
- **Ethical fundraising:** no percentage-based compensation; adherence to professional standards

- **Expenses:** pre-approval rules, caps, receipts, travel policy
- **Intellectual property/ownership:** campaign materials and donor documentation
- **Conflict of interest:** disclosure and mitigation
- **Termination:** for convenience/for cause, notice periods, transition of materials
- **Insurance (if applicable):** professional liability/general liability

Appendix G — Optional Campaign Intake Questions (For Proponents)

1. What is your recommended campaign structure (quiet phase/public phase) for a \$1,000,000 endowment and why?
2. What gift range chart and number of leadership gifts do you anticipate will be required?
3. How will you identify and qualify prospects in Central Alberta (and beyond, if relevant)?
4. What level of direct solicitation will your team provide (number of donor meetings/month, who leads asks, etc.)?
5. How will you support LPS Board members and volunteers in cultivation and solicitation?
6. How will you approach trauma-informed communications and privacy, given the sensitive nature of the mission?
7. What reporting tools or formats will you use to document donor activity and progress?
8. What key risks do you foresee for this campaign and how will you mitigate them?