# 2026 Advancement Review Services
REQUEST FOR PROPOSAL

King's University College
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London, ON
N6A 2M3

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## INSTRUCTIONS TO BIDDERS

### 1. Summary

This document requests bids an advancement review at King's University College (hereby referred to as "King's").

The Advancement Review Services Selection Committee (hereby referred to as "the Committee") will be made up of King's administrators.

### 2. Bid Submissions

King's is committed to equity and diversity and encourages applications from all qualified Bidders including women, members of visible minorities, aboriginal persons and persons with disabilities.

To receive consideration, bids must be submitted in accordance with the following instructions. Failure to comply with these instructions will result in the bid being disqualified.

Attachment 1 - Request for Proposal Form and Attachment 2 - Bidder References must be included in the bid submission. There shall be no alteration of or changes made to the Form. Any alterations made to the Form, other than the supply of the required information, may result in the bid being declared non-compliant and rejected without further consideration.

All bids must be emailed by the date/time outlined in Schedule A to Tiffany Chisholm, Purchasing Services Coordinator at tiffany.chisholm@kings.uwo.ca with a subject line containing "2027 Advancement Review Services RFP" and the name of the Bidder.

King's is not responsible for the timeliness of documents emailed nor will King's accept any bid emailed to an email address other than the specified email address above. King's is neither liable nor responsible for any costs incurred by a Bidder in the preparation or submission of their bid to this RFP.

Bidders are advised that it is not permissible to send a copy(s) of a response to any employee, consultant, agent, volunteer or business employed or working on behalf of King's or involved in this process, and King's will reject without further consideration any response so delivered.

All documents related to the bid become the property of King's. All information, data, recommendations and reports resulting from the project become the property of King's.

### 3. Inquiries

Bidders having any questions or requiring clarification of the intent or meaning of any part thereof shall notify Tiffany Chisholm by email (tiffany.chisholm@kings.uwo.ca) by the deadline for submission of questions as outlined in Schedule A.

### 4. Communication of all RFP documents

The original RFP document will be posted on Biddingo and the King's website.

If it becomes necessary to revise any part of this RFP, addenda and amendments will be posted solely on the King's website https://www.kings.uwo.ca/about-kings/facts-and-information/administrative-departments/finance/rfp/.

It is the sole responsibility of each potential bidder to check the King's website for any/all changes to the original RFP document, as these will become part of the RFP specifications.

For RFP's valued $100,000 or more, the award notice will be posted solely on Biddingo.

**5. Assessment of Response**

All bids will be opened in private. The Committee will evaluate the bids based on the pre-determined evaluation criteria outlined in Schedule B.

As the Committee evaluates the bids, decisions will be based on the contents of the bid as submitted. Each Bidder shall include any and all information required as outlined in Schedule C. It shall be explicitly understood that there shall be no opportunity to make any material change to the bid, including any alteration, addition or deletion of any element within the bid as submitted based on dates outlined in Schedule A. Information submitted independent of the response document or after closing will not be considered by the Committee.

King's may seek clarifications from a Bidder after the closing date. Clarification questions will be submitted to the Bidder in writing. Answers to the written clarification questions must be returned to King's in writing. The intent of the clarification is simply to obtain further explanation and understanding of what was intended by the Bidder. A clarification shall not provide an opportunity to make any material changes to the original bid, including any alteration, addition or deletion of any element of the original bid.

**6. Bid Acceptance/Rejection**

No action by King's or the Committee implied or otherwise, shall be construed as acceptance to this RFP.

King's reserves the right to accept any bid (in whole, or a portion thereof) which may be deemed to be most advantageous to King's, or to reject any or all bids. Although King's would like to award this contract to one Bidder, it realizes that it may not be in King's best interest to do so. Bidders shall highlight in the bid any cost or operational advantages of awarding all service requests to one Bidder.

King's may declare, at its sole and unfettered discretion, any bid to be non-compliant, and reject without further consideration if it:

- is informal, incomplete, unqualified, or otherwise irregular in any way;
- is not legible, is not dated, is not executed in the legal registered name of the entity, is not signed by authorized officials, and/or does not acknowledge all addenda that may have been issued;
- is submitted without the required materials (eg. Request for Proposal Form);
- does not provide the information called for in the RFP documents as outlined in Schedule C and the Forms/Attachments required as outline in Attachment 1;
- does not contain sufficient information for the Committee to evaluate the Bid based on the evaluation criteria contained in Schedule B.

King's, at its sole and unfettered discretion, may reject without further consideration any response where the Bidder, a member of the Bidder's team, an employee, shareholder, director, officer, partner or person otherwise associated with the Bidder:

- has now or has in the past, unsatisfactorily performed work for King's or had an unsatisfactory relationship with King's, by contract or otherwise, in the sole opinion of King's;
- has a contract with King's which in the sole opinion of King's, is not in good standing or has had a contract terminated by King's for non-performance;

- is engaged in a substantially unresolved dispute or is in litigation with King's or has a claim or judgment arising from litigation;
- has been charged or convicted of an offence with regard to a business enterprise which has or may have an impact upon King's;
- is considered to have a conflict of interest, in the sole opinion of King's.

**7. Invoicing and Payment**

King's standard payment policy is net 30 days following receipt of invoice and sign-off by the responsible department or faculty. Final payment terms will be negotiated between the successful Bidder (if any), and King's prior to contract signing.

**8. Debriefing (applies to RFP valued $100,000 or more)**

The successful Bidder(s) will be notified of their success according to the Notification to Successful Bidder timeline in Schedule A.

Once an agreement is executed by King's and the successful Bidder, the other Bidders will be notified by a public award notice found on Biddingo. If is the Bidders responsibility to check this public posting.

After the Notification to Successful Bidder date on Schedule A, and within sixty (60) days, Bidders may request a written debrief by emailing Tiffany Chisholm at tiffany.chisholm@kings.uwo.ca. The intent of the written debrief is to aid the Bidder in presenting a better proposal in subsequent procurement opportunities. Any debriefing provided is not for the purpose of providing an opportunity to challenge the procurement process.

**9. Confidentiality and Data Privacy**

All information provided by King's, its partners, or clients in relation to this RFP must be treated as confidential and used solely for the purpose of responding to this RFP. The selected Bidder will be required to adhere to strict confidentiality and data privacy standards during the project's lifecycle and beyond.

**Bidder Responsibilities -** The Bid must demonstrate the ability of the Bidder to handle and protect sensitive information in accordance with applicable legal and regulatory requirements, including but not limited to:

1. **Data Protection Laws Compliance**: Adhering to applicable data privacy laws ( e.g., FIPPA, PHIPA, PIPEDA, etc.].
2. **Confidentiality Agreements**: Signing an Agreement for the Confidentiality and Security of Personal Information with King's prior to accessing any sensitive information.
3. **Data Access and Usage**: Ensuring that only authorized personnel have access to confidential information and that such information is used exclusively for the purposes outlined in this RFP.
4. **Data Security Standards**: Implementing industry-standard security practices, such as encryption, secure storage, and robust authentication mechanisms, to safeguard confidential data.
5. **Incident Reporting**: Promptly notifying King's of any actual or suspected data breach or unauthorized disclosure of information, and cooperating fully with mitigation efforts.

**Deliverables –** The Bid must include:

- A description of their data protection and confidentiality policies.
- Information about measures and technologies used to ensure data security.
- Details of compliance certifications or audits (e.g., ISO 27001, SOC 2).
- A proposed approach for ensuring ongoing compliance and protection throughout the engagement.

**Contractual Obligations -** The selected Bidder will be required to agree to:

- Strict confidentiality provisions outlined in the final agreement.

- Return or secure destruction of all confidential data upon project completion or termination, as specified by King's.
- Regular reporting and review of data security measures upon request.

**Evaluation Criteria -** Proposals will be assessed based on:

- Demonstrated ability to comply with confidentiality and data privacy requirements.
- Strength of security protocols and track record of maintaining data integrity.
- Overall risk mitigation strategy related to handling sensitive information.

## 10. Accessibility

King's is committed to recognizing the dignity and independence of all and seeks to ensure that persons with disabilities have genuine, open and unhindered access to King's RFP opportunities. If you require an accommodation during the RFP process, please contact Tiffany Chisholm at tiffany.chisholm@kings.uwo.ca or 519-433-3491 for assistance.

As outlined in the Ontario Regulation 429-07, Accessibility for Ontarians with Disability Act, 2005, King's will incorporate accessibility criteria and features when procuring, goods, services and facilities, except where it is not practical to do so.

The Bidder will respect the dignity and independence of persons with disabilities in accordance with the Accessibility Standards for Integrated Accessibility Standards O. Reg. 191/11, s. 5 (1); O. Reg. 413/12, s. 4 (1) developed under the Accessibility for Ontarians with Disabilities Act, 2005.

*End of Instructions to Bidders*

## SCHEDULE A – TARGET DATES

King's has identified the following project target dates:

| Activity | Target Date |
|---|---|
| RFP Issued | Wednesday, November 18th, 2026 |
| Deadline for Questions/Clarifications on RFP | Friday, December 4th, 2026 @ 4:30pm |
| Deadline for Answers/Clarifications on RFP | Wednesday, December 9th, 2026 @ 4:30pm |
| Closing Date: RFP Submissions Due | Friday, December 18th, 2026 @ 4:30pm |
| RFP Review Period & Committee Deliberation | January 4th, 2027 – January 8th, 2027 |
| Notification to Successful Bidder | Friday, January 8th, 2027 |
| Contract Development | January 11th, 2027 – January 15th, 2027 |
| Services Start | Monday, January 18th, 2027 |

*End of Schedule A – Target Dates*

## SCHEDULE B – EVALUATION CRITERIA

Bidders are responsible for reviewing the evaluation criteria listed below and providing appropriate and sufficient information to enable the Committee to accurately assess the Bid.

Evaluation of submissions will be undertaken by the Committee. Each Bid will be rated on a scale of 1-10 (1 = poor, 10 = excellent) by the Committee members and the averages will determine final rankings as a tool contributing to overall assessment of RFP submissions. The rating will not be the sole determining factor in the final decision. Bids will be evaluated on the following criteria using weights provided:

| **REQUIRED CRITERIA** | | **Yes/No** |
|---|---|---|
| The Bidders ability to meet the implementation dates as outlined in Schedule A. | | Yes/No |
| The Bidders ability to comply with confidentiality and data privacy requirements. | | Yes/No |
| The Bidder included Attachment 1 and 2 in their Bid. | | Yes/No |
| **WEIGHTED CRITERIA** | **WHAT WE ARE LOOKING FOR** | **Weight** |
| Sector experience | Recent advancement reviews for Canadian universities and colleges, ideally including small or affiliated institutions | 10 |
| Understanding of mission | Fit with a values-driven, faith-rooted liberal arts institution and its community | 5 |
| Methodology | A clear, collaborative and inclusive process that builds on existing strengths | 5 |
| Research capacity | Ability to deliver sector trend and peer comparator analysis | 5 |
| Governance expertise | Experience advising foundation and volunteer boards on mandate and structure | 10 |
| Team | Named senior lead and team, with relevant biographies and availability | 15 |
| Deliverables and timing | Practical, action-oriented recommendations within the three-month timeline | 15 |
| Value | Value for services, transparent fees, incidentals and optional services | 20 |
| References | At least three (3) recent post-secondary client references | 10 |
| Equity and inclusion | Demonstrated commitment to inclusive practice | 5 |
| **TOTAL POINTS** | | **100** |

*End of Schedule B – Evaluation Criteria*

## SCHEDULE C – SCOPE OF OPPORTUNITY

1. **Background Information**

   King's is a Catholic undergraduate, liberal arts educational institution academically affiliated with the University of Western Ontario ("Western"). Founded in 1954, King's provides general and honours degree programs in liberal arts, social sciences, and social work, as well as a Master's degree in social work. King's is home to over 3500 full and part-time students from across Canada and 35 other countries from around the world. King's is recognized, both nationally and internationally, for its excellent academic programs, comprehensive student services and valuable opportunities that unlock student's potential.

2. **Project Description**

   King's seeks an experienced consultant to conduct a focused Advancement Review over roughly three (3) months. The review will assess current fundraising and alumni engagement and deliver a strategic roadmap to grow philanthropic revenue and build long-term advancement capacity. It will also help clarify the mandate and role of the affiliated Foundation board.

3. **Deliverables**

   The review will examine these areas of inquiry:

| Area | Key questions |
|---|---|
| Philanthropic potential | Where are the growth opportunities in leadership, major, planned,and principal/transformative giving? How are annual, digital and event programs performing? What is the capacity for campaign launch/readiness? |
| Best practices | How does performance compare with sector norms and peer institutions? Which programs are working and which need recalibration? |
| Culture of philanthropy | Are leaders, board members, faculty, volunteers and students aware of and engaged in their role in fundraising? |
| Team alignment and support | Are roles clear and focused on the highest-value activities? What tools, training and measures will help the team succeed? |
| Stewardship and donor engagement | Is stewardship tailored by donor segment? What proactive initiatives would deepen relationships? |
| Boards and volunteer leadership | What is the right mandate for the Foundation board (governance, fundraising, endowment oversight)? Which volunteer models would add most value? |
| Principal and Major gifts | How strong is the prospect pipeline, research capacity and relationship-management process? |
| Communications, data and policy | Is advancement messaging integrated with institutional communications? Is the database used to full potential? Are there policy gaps? |

After the above review, a preliminary findings session will be held with senior leadership, then a concise final report with assessment, recommended strategies and action steps. An optional facilitated Foundation board planning session may follow.

4. **Approach and Timing**
   We expect a collaborative, strengths-based process completed in about three (3) months:
   1. **Design meeting (month 1):** confirm scope, timelines, roles and a check-in rhythm with leadership.
   2. **Discovery (months 1–2):** document and financial review, sector trends and comparator research (about five peer institutions), and 5–7 internal consultations.
   3. **Findings session (months 2–3):** present observations and preliminary directions for leadership feedback.
   4. **Final report (month 3):** recommended strategies and action steps.

*End of Schedule C – Scope of Opportunity*

## ATTACHMENT 1 - REQUEST FOR PROPOSAL FORM

| Bidder Identity | |
|---|---|
| Full Legal Registered Name | |
| Any Other Relevant Name | |
| Year Established | |
| Head Office Address | |
| Phone Number | |
| Type of Entity | __ Corporation<br>__ Unregistered Partnership<br>__ Registered Partnership<br>__ Proprietorship<br>__ Other. Explain: |
| Number of Employees | |

We the undersigned, having examined the 2026 Advancement Review Services RFP documents (including any and all addenda and amendments), and are satisfied that we understand the services as identified. We further acknowledge that we have not relied on the completeness of such information and declare ourselves competent to undertake and complete the services and do hereby irrevocably propose and agree to carry out the services outlined in Schedule C. We acknowledge that the submitted bid must include the Attachment 1 - Request for Proposal Form and Attachment 2 - Bidder References.

For the purposes of this section, the term "Conflict of Interest" means in relation to the RFP process, the Bidder has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to:

(i) having or having access to confidential information of King's in the preparation of its proposal that is not available to other Bidders;

(ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process); or

(iii) engaging in conduct that compromises or could be seen to compromise the integrity of the RFP process.

We hereby certify that we have no conflict of interest in submitting this bid. If we feel an actual or potential conflict of interest exists, we will provide a separate statement outlining the details.

The undersigned hereby represents and warrants as to having authority to execute the document on behalf of the Bidder.

Name of Authorized Officer(s): _____

Signature(s): _____

Executed this ____ day of _____ , 2026.

*End of Attachment 1 - Request For Proposal Form*

## ATTACHMENT 2 – BIDDER REFERENCES

Bidders must provide three (3) references from clients who have obtained similar services in the last three (3) years. References should be external to King's. King's reserves the right to conduct reference checks. Bidders can use a separate sheet for this information if preferred. This is not grounds for disqualification.

| **Bidder Reference #1** | |
|---|---|
| Company Name | |
| Company Address | |
| Contact Name | |
| Contact Email Address | |
| Date and Duration of Service | |
| Description and Relevancy | |

| **Bidder Reference #2** | |
|---|---|
| Company Name | |
| Company Address | |
| Contact Name | |
| Contact Email Address | |
| Date and Duration of Service | |
| Description and Relevancy | |

| **Bidder Reference #3** | |
|---|---|
| Company Name | |
| Company Address | |
| Contact Name | |
| Contact Email Address | |
| Date and Duration of Service | |
| Description and Relevancy | |

*End of Attachment 2 – Bidder References*