



Request for Proposals for Fund Development Consultant

December 1, 2022

Project Overview

Trellis (trellisconnects.org) is a nonprofit organization that operates at the intersection of aging, health and equity. We are positioned as a national leader in the drive to provide social care for older adults that is integrated with medical care. We provide services, connections and innovations focused on those who are most in need to ensure that all people have the supports to address the complexities of later life and to optimize well-being as they age.

Current core funding sources available to Trellis, primarily federal Older Americans Act and state Senior LinkAge Line funds, are expected to be essentially flat over the next decade while the older population grows exponentially in numbers and diversity. To achieve our forward-focused mission, Trellis needs access to flexible resources that will allow us to sustain and expand services. We are interested in contracting with an experienced professional to help us develop and implement a resource development plan.

Background

Trellis is the federally designated area agency on aging for the Twin Cities metro area and in that role administers funding to community-based organizations to provide home and community-based services to older adults. We also operate the Senior LinkAge Line in the metro area. These services are funded under contracts with the Minnesota Board on Aging. Trellis also provides the following programs and services that we believe provide excellent potential for resource development. (See our [2021 Annual Report](#) for more detailed information.)

Juniper Evidence-Based Health Promotion

Juniper (yourjuniper.org) helps communities throughout Minnesota create a culture of health by providing evidence-based health promotion programs that equip older adults to take charge of their health and well-being. Juniper offers 16 programs focused on helping people get fit, manage chronic disease and lower the risk of falls. Programs are delivered in partnership with a network of 80+ nonprofit, healthcare and housing organizations located throughout Minnesota.

Juniper: Social Determinants of Health Navigator Service

Juniper partners with healthcare organizations to integrate social care with medical care for whole person care. Juniper navigators work as part of a care team to help individuals with a triggering event such as a hospitalization connect with social supports that help them get back on their feet more quickly and reduce the overall cost of care.

Pension and Retirement Rights

Trellis Pension and Retirement Rights offers legal assistance to retirees in the six-state region of Minnesota, Wisconsin, Iowa, North Dakota, South Dakota and Nebraska. The program helps people receive the pension and retirement benefits that they have earned but are having difficulty accessing. Trellis Pension and Retirement Rights recovers about four dollars for our clients for every dollar invested.

Dementia Friendly Initiatives

Trellis offers three statewide initiatives that work to make communities places where people with memory loss can live and thrive.

- **ACT on Alzheimer's®** (actonalz.org) equips communities to support people with Alzheimer's disease and other dementias. The ACT initiative developed the Dementia Friendly Communities Toolkit, a set of comprehensive tools to help communities lead local efforts which has been adopted by Dementia Friendly America for use nationwide. It has fostered more than 60 community-based Action Communities across Minnesota. Stratis Health, Alzheimer's Association of Minnesota and North Dakota, Minnesota Board on Aging and Trellis are core members of the collaborative.
- **Dementia Friends** is a global movement to change the way we think, act and talk about dementia. By helping everyone in a community understand what dementia is and how it affects people, everyone can make a difference for people touched by dementia. Volunteer Dementia Friends Champions lead free Dementia Friends Information Sessions for the public and private groups.
- **The Remember Project** (rememberproject.org) uses the arts as a tool to support the Dementia-Friendly Communities movement by raising awareness and ending the stigma, fear and isolation related to memory loss. The Remember Project has reached audiences across the United States with live, virtual and hybrid events, providing programming for the broader community as well as targeted audiences of business leaders, first responders, health care providers, social workers, faith leaders and secondary/post-secondary students.

Trellis has been quite successful in securing funding from state and federal governmental entities, including the federal Administration for Community Living and the Minnesota Department of Health, and from private foundations, including the Otto Bremer Trust, Delta Dental Foundation of Minnesota and Mardag. We have developed a small fee-for-service business, primarily with health organization payers. We have only scratched the surface of the potential for marketing sponsorships and individual donors. We have a very basic infrastructure for managing and tracking donations and a small list of past and potential donors with full contact information. Trellis has recently met the Accountability Standards® of the Charities Review Council which ensures that we have policies and practices in place for ethical stewardship of contributed resources.

While Trellis has no dedicated development staff, we have put in place a cross-functional Resource Development Team, led by Dawn Simonson, President and CEO, and includes the VPs of communications, finance and program areas as well as others with specialized expertise. The team is committed to resource development as a high priority and to working actively with the professional contracted under this RFP to achieve our goals.

Our currently defined goals are:

1. Develop an enterprise-wide strategy for a diversified development plan.
2. Establish the internal infrastructure of people, processes and tools needed to identify, track, solicit and steward donors.
3. Implement the development plan in 2023 through 2025.

Project Scope and Deliverables

Trellis intends to contract with a resource development professional for a period of up to two years to support strategic planning and pragmatic implementation of our resource development goals. Specific activities include:

1. Understand and assess our current situation including the likely success of each avenue for resource development. *Deliverable:* A written assessment and recommendation. This phase should be delivered within 3 months of the start of the contract.
2. Identify essential infrastructure needs to support the development plan and recommend specific solutions to meet those needs. *Deliverable:* Written report of recommended solutions within 4 months of start of agreement and support getting the infrastructure in place within 1 year of start of contract.
3. Working collaboratively with the Trellis Resource Development Team, develop a three-year (2023-2025) resource development plan with goals and objectives, action plans and timelines, and roles (including board roles). *Deliverable:* A written development plan, along with a value proposition, delivered within 5 months of the start of the contract.
4. Support and coordinate the president/CEO, VPs and program leads in implementing the plan. This includes identifying and assisting them in forming key relationships, securing financial support and organizing special events for donors. *Deliverable:* Ongoing support throughout the rest of the contract.

Timeline

- Issue RFP by 12/1/22
- Responses due by 1/17/23
- Select consultant by 2/9/23
- Launch by 03/01/23
- Have fundraising plan in place by 8/30/23

General Provisions

Trellis reserves the right to modify or exclude any consideration, information or requirement contained in this RFP, and to add new considerations, information or requirements at any stage of the process, including during negotiations with the selected proposer.

The RFP contains no contractual offer of any kind. Any proposal submitted will be regarded as an offer made by the proposer and not as an acceptance by the proposer of the offer made by Trellis. No contractual relationship will exist except pursuant to a written contract document signed by both parties. The RFP does not commit Trellis to consider any proposal, to award a contract or to pay any costs incurred in the submission of the proposal.



Proposal Requirements

Submitter's information

Name, address, URL (if available) and telephone number of the submitting individual or company. Include name, title and email address of the individual who will serve as the primary contact. Please also indicate if your company is a minority-owned or women-owned business. Trellis is deeply committed to racial equity in our community and in the way we conduct our programs and business practices. Please describe your organization's approach to racial equity, inclusion and cultural competency, including equity in your work with your clients. Let us know if you are registered with the State of MN as a professional fundraiser.

Project approach

Explain your approach and process to meet the requirements of the project.

Experience and qualifications

Include a description of your history, experience and qualifications, including descriptions of projects that are similar in scale to this one that you have completed.

Cost

Include the cost of your services broken down for each of the four deliverables identified above — assessing current situation, recommending infrastructure, developing a plan, supporting implementation of the plan.

Questions and Responses

Please submit your proposal via email to David Kittelson, Executive Assistant and Planning Coordinator, at dkittelson@trellisconnects.org. We are happy to provide additional information and answer questions related to the RFP. Contact David by email or phone at 651-917-4607 and he will put you in contact with the appropriate person to answer your questions.