

REGINA PUBLIC SCHOOLS



REQUEST FOR PROPOSAL:

For

**Endowment and Non-Endowment Fund, and Donation
Management**

RBE EUNA PROCUREMENT REF: **2627-07**

CLOSING DATE:

October 30, 2026, at 2:00 p.m. (Central Standard Time)

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INSTRUCTIONS TO PROPONENTS

INTRODUCTION

1. The Board of Education of the Regina School Division No. 4 of Saskatchewan (the "RBE"), is seeking proposals from qualified Proponents to manage endowment and non-endowment funds, philanthropic, and other donations (the "**Goods and Services**") on behalf of RBE. The intent is to establish a partnership that manages donations, enhances donor engagement, and ensures professional fund management of donations received by or in support of RBE. Further details about the Goods and Services required by RBE are set out in Schedule "A" – Requirements.
2. This RFP provides an equal and transparent opportunity for all qualified organizations—including, but not limited to, community foundations and other philanthropic fund managers—to submit proposals.
3. The initial term of this Agreement will be ten (10) years, with the option for two (2) additional five-year renewal terms (a "**Renewal Term**"), subject to the mutual agreement of both parties.

RBE employs approximately 3,300 staff members and is Saskatchewan's second largest school division with an enrollment of more than 26,000 students.

The purpose of this Request for Proposals ("RFP") process is to select a qualified Proponent to enter into an Agreement with RBE for the delivery of the Goods and Services. Further details about the Goods and Services required by RBE are set out in Schedule "A" – Requirements.

4. **This RFP is not a tender and is not subject to the laws of competitive bidding. No bid contract or agreement is created by the submission of a proposal.**

RFP DOCUMENTS

5. The following documents are attached to and form part of this RFP:

Schedule "A" – Requirements

Schedule "B" – Proposal Content Requirements

Schedule "C" – Contracting Principles

Appendix "A" - Pricing

Appendix "B" - Proposal Questionnaire

INQUIRIES

6. Proponents are responsible for reading and familiarizing themselves with the provisions of this RFP and other accompanying documents (as applicable) and should make those inquiries and investigations it considers necessary for the preparation and submission of its proposal.
7. Any inquiries concerning this RFP should be directed in writing to the following:
 - All questions about this RFP should be posted on Euna Procurement before 2:00 p.m. (Central Standard Time) on **October 15, 2026**. An addendum with all questions and answers will be posted by **October 22, 2026** prior to 2:00 p.m. (Central Standard Time) with respect to this RFP.
8. RBE may circulate its response to any inquiries to all Proponents, along with the original inquiry and may post such response and original inquiry on Euna Procurement or may choose not to reply to any inquiry.

9. Proponents should refrain from contacting other employees, agents or officials of RBE in respect of this RFP process, including for the purposes of lobbying or attempting to influence the outcome of this RFP process. Any such contact may, in RBE's sole discretion, result in disqualification.

SUBMISSION OF PROPOSALS

10. All proposals submitted and any other correspondence must be in English. All submissions must be prepared in a legible manner. Non-legible proposals may, in RBE's sole discretion, be rejected without further review.
11. Proposals must be received by **2:00 p.m. (Central Standard Time) October 30, 2026**. This RFP is posted on SaskTender as required, but all proposals must be submitted via Euna Procurement. RBE will accept only electronic proposals at the following website: <https://rbesk.bonfirehub.ca/projects>
12. Proponents must complete and include the Proponent Information Form and Business References as part of their submission. Blank forms are provided as part of this RFP package on the Euna Procurement platform.
13. If you require additional time to submit your proposal, you should contact Rudy Utschick by e-mail to rudy.utschick@rbe.sk.ca. RBE may, in its sole discretion, allow additional time for Proponents to submit a proposal.
14. Proposals and accompanying documentation provided to RBE in response to this RFP will not be returned.

CONTENT OF PROPOSALS

15. Proposals should address the items set out in Schedule "B" - Proposal Content Requirements.
16. Proponents may provide additional information beyond that requested in the RFP for RBE's consideration. Any such additional information may be considered by RBE in its sole discretion.
17. Proponents may be asked to submit additional information pertaining to their past experience, qualifications and such other information that RBE might reasonably require.
18. Alternative, value-added or innovative proposals are encouraged. However, Proponents submitting such proposals are asked, if possible, to also provide a proposal in accordance with the base Requirements of this RFP. The alternative/value-added/innovative proposal portion of the response should be clearly identified as such and separated from the proposal provided for the base Requirements.

COST OF PROPOSALS

19. RBE is not responsible for any costs incurred by Proponents in preparing their proposals, attending any meetings or interviews with RBE, making any presentations to RBE in connection with their proposals, or otherwise incurred in connection with this RFP process.
20. This RFP does not create any legal obligations between RBE and any Proponent.

EVALUATION PROCESS

21. Proposals will be opened and evaluated privately.
22. In assessing proposals, RBE will take into consideration the following evaluation criteria:

Evaluation Criteria	Weight
Organizational qualifications and relevant experience	30%
Proposed service approach, including reporting and compliance	40%
Fees and overall value	30%

Evaluation will be conducted at the sole discretion of the RBE to determine the proposal that best meets the overall needs of the Division. Subject to applicable law, all evaluation results and rankings will remain confidential and will not be disclosed to Proponents. When reviewing proposals, the RBE will consider the following subcategories. Proponents are encouraged to focus on these areas to strengthen their submissions and maximize their scoring potential.

Criteria	Weight	Details
A. Organizational Qualifications & Relevant Experience	30%	- Experience managing endowment, non-endowment, or charitable funds for public-sector or non-profit organizations
		- Organizational stability, governance, and financial oversight
		- Knowledge of CRA requirements for charitable receipt and fund administration
		- Qualifications of key personnel
		- References demonstrating successful comparable partnerships
B. Service Approach, Reporting & Compliance	40%	- Approach to establishing and managing endowment and non-endowment funds
		- Processes for managing restricted and unrestricted donations
		- Donor services, including receipting and stewardship
		- Reporting practices (frequency, transparency, sample reports)
		- Compliance with legislation, CRA rules, and audit requirements
		- Administrative workflows and communication processes
C. Fees & Overall Value	30%	- Fee structure and transparency
		- Cost-effectiveness relative to services offered
		- Long-term value to RBE
		- Potential efficiencies or cost savings

		- Any financial advantages or value-added components
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Proposals will be evaluated on the basis of the information provided in response to these Instructions to Proponents. In addition, in assessing the Proponent's qualifications, experience and capacity, RBE may also consider the following:

- clarifications and/or additional information that may be supplied pursuant to requests from RBE;
 - interviews and/or reference checks that may be conducted at RBE's discretion.
 - previous experience of RBE in working with the Proponent; and
 - information received from any source that RBE considers reliable.
23. It is important for Proponents to note that certain evaluation criteria (such as reference checks) may be viewed by RBE, in its sole discretion, as overriding in nature such that a Proponent may be rejected on the basis of serious problems or issues in one of these categories alone, whether such issues are apparent in the initial evaluation of proposals or become apparent to RBE at any other time during the RFP process.
24. RBE may, in its sole discretion, request clarification from a Proponent during the evaluation process.
25. Proponents are advised that the evaluation process is subjective in nature and RBE's intention is to consider, in its sole discretion, each proposal on its merits, without regard to the rules or principles of competitive bidding, including without regard to whether a proposal is compliant with this RFP.
26. RBE may short-list Proponents and conduct interviews, conference calls and/or presentations with short-listed Proponents at its sole discretion. Furthermore, RBE may negotiate any and all aspects of a proposal, including but not limited to the fee proposal and agreement terms, with one or more Proponents.
27. An invitation to interview or to negotiate does not obligate RBE to conclude an agreement with that Proponent. RBE may interview or may negotiate any aspect of any proposal with one or more Proponents at any time.
28. RBE will notify all unsuccessful Proponents after entering into a definitive agreement with the successful Proponent. Unsuccessful Proponents may request a debrief interview to obtain feedback on their proposal after receiving this notification. Proponents should send their request for a debriefing in writing to Rudy Utschick at rudy.utschick@rbe.sk.ca no later than thirty (30) days after receipt of the notification. RBE will determine the format and content of the debriefing session.

ANTICIPATED SCHEDULE OF EVENTS

29. The following is the anticipated schedule of events related to this RFP. These dates are provided as target dates only and may be changed at any time by RBE in its sole discretion:

ACTIVITY	MILESTONE DATE
Release of RFP	October 1, 2026, at 2:00 p.m. CST

Deadline for Submission of Questions	October 15, 2026, at 2:00 p.m. CST
Last Addendum Issued	October 22, 2026, at 2:00 p.m. CST
Proposal Closing Date	October 30, 2026, at 2:00 p.m. CST
Notice of Award to Successful Proponent	Approximately 60 days after Closing date

FORM OF AGREEMENT

30. The agreement will be issued by RBE and will govern the terms and conditions of the services. See Schedule "C" – Contracting Principles.

EFFECT OF RFP

31. This RFP is not intended to be a tender or otherwise subject to the laws applicable to competitive bidding. Until such time as RBE signs a definitive agreement with a Proponent, RBE does not intend to create a contractual relationship (including a bid contract), either express or implied, with any Proponent submitting a response to this RFP.
32. For greater certainty, terms such as "requirement", "shall", "must" or other similar imperatives used in this RFP are intended as terms of convenience only, unless otherwise identified specifically as a mandatory requirement. RBE intends to evaluate proposals on the extent to which a Proponent's proposal is able to meet such items, but in no event shall RBE be required to disqualify or reject any proposal on the basis that such item is not met or only partially met.
33. Submission of a proposal does not obligate RBE to accept any proposal or to proceed further with any of the Goods or Services. Consideration of any proposal shall be in RBE's sole discretion.
34. Proposals may be withdrawn or amended by a Proponent at any time by written notice to RBE prior to RBE and the Proponent signing a formal agreement.
35. Proponents are advised that RBE is intending to conduct a flexible procurement process, not subject to the law of competitive bidding, and that RBE may, in its sole discretion, at any time and for any reason:
- a) reject any and all proposals (including, for greater certainty, the lowest cost proposal);
 - b) modify or vary any aspect of this RFP at any time before or after the time for submission of proposals;
 - c) extend the deadline for submission of proposals at any time before or after the time for submission of proposals;
 - d) accept any non-compliant, conditional or irregular proposal or any alternate proposal, in whole or in part;
 - e) discuss the terms of a proposal submitted by a Proponent with that Proponent at any time, on a confidential basis, for the purposes of clarification and/or negotiation of that proposal;
 - f) allow any Proponent submitting a proposal to modify or vary any aspect of its proposal at any time;
 - g) verify or seek clarification of any and all information provided pursuant to this RFP and provide Proponents with an opportunity to correct any defects, informalities or irregularities in their proposal;

- h) negotiate any and all aspects of any proposal and the provisions of the agreement (including, without limitation, those provisions relating to fees and/or any scope of supply of goods or services) with any one or more Proponents at any time in its sole discretion, whether before, during or after the selection and evaluation process; and
 - i) cancel this RFP at any time for any reason and thereafter proceed in any manner it sees fit, in its sole discretion, including:
 - i. issuing a new request for proposals or other procurement document based on the same or changed scope of goods and services or other requirements;
 - ii. entering into sole source negotiations with any one or more of the Proponents or any other person; or
 - iii. cancelling the procurement in its entirety.
36. This RFP and the final agreement entered into by RBE and the successful Proponent shall be governed and construed in accordance with the laws of the Province of Saskatchewan and the federal laws of Canada applicable therein.

CONFIDENTIALITY, PUBLIC ANNOUNCEMENTS

37. Proponents are expected to keep confidential all documents, data, information and other materials of RBE which are provided to or obtained or accessed by a Proponent in relation to this RFP, other than documents which RBE places in the public domain. Proponents are expected not to make any public announcements or news releases regarding this RFP or the entering into of a definitive agreement pursuant to this RFP, without the prior written approval of RBE.
38. Proponents are advised that RBE is subject to the provisions of The Local Authority Freedom of Information and Protection of Privacy Act (Saskatchewan), which provides a right of access to information in records under the control of a publicly-funded academic entity. Proponents are advised that RBE may be required to disclose the RFP documents and a part or parts of any proposal in response to this RFP pursuant to The Local Authority Freedom of Information and Protection of Privacy Act (Saskatchewan).
39. Proponents are also advised that The Local Authority Freedom of Information and Protection of Privacy Act (Saskatchewan) does provide protection for confidential and proprietary business information; however, Proponents are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information should be marked as such in their proposal in response to this RFP. **Proponents should identify any information in their proposals that they consider to be confidential or proprietary business information.**
40. The proponent must fully disclose in its RFP submission any actual, potential, or perceived conflicts of interest related to its participation in this RFP or its ability to provide the requested services to RBE, including the nature of each conflict. This disclosure must include any family, business, or personal relationships that the proponent or any proposed key personnel may have with RBE, RBE Personnel. RBE may request additional information regarding any disclosed relationship.

TRADE AGREEMENTS

41. Proponents are advised that procurements issued by RBE fall within the scope of one or more of:
- *The New West Partnership Trade Agreement;*

- Chapter 19 of the *Canada – European Union Comprehensive Economic and Trade Agreement*, including its incorporation by reference into the *Agreement on Trade Continuity between the United Kingdom of Great Britain and Northern Ireland and Canada*;
- Chapter 5 of the *Canadian Free Trade Agreement*;

and are subject to those trade agreements, but that the rights and obligations of the parties will be governed by the specific terms of this RFP. The bid notice can be viewed on sasktenders.gov.sk and Euna Procurement.

Schedule "A" – Requirements

1. Background and Description of the Project

The Board of Education of the Regina School Division No. 4 of Saskatchewan (the "**RBE**"), is one of the largest school divisions in the province, serving the educational needs of close to 27,000 students in 43 public elementary schools, eight public high schools, three faith-based associate schools, as well as at Campus Regina Public and the Allan Blakeney Adult Campus. The school division operates on Treaty 4 territory and the homeland of the Métis.

RBE currently receives various forms of donations, including memorial gifts, program-specific contributions, and occasional legacy gifts. To strengthen donor engagement, ensure compliance, and reduce administrative workload, the Division is issuing this RFP to solicit proposals from qualified and experienced Proponents to provide Endowment and Non-Endowment Donation Management services (the "**Goods and Services**") to RBE for a ten (10)-year term (the "Initial Term"), with the option to extend for two (2) additional five (5)-year terms (a "Renewal Term") upon mutual agreement of both parties.

2. Scope of the Goods and Services

The successful Proponent will be responsible for providing comprehensive Endowment and Non-Endowment Donation Management services to RBE. Required services include, but are not limited to, the following:

a. Endowment and Non-Endowment Donation Management

- Establish and manage Endowment and Non-Endowment funds in accordance with [Administrative Procedure 536](#).
- Administer Endowment and Non-Endowment funds, including investment management, aligned with industry's best practices.
- Provide annual reporting on fund performance, distributions, and investment results.
- Ensure funds are distributed in accordance with donor instructions and Division policies.

b. Donor Services

- Issue CRA-compliant charitable tax receipts.
- Provide donor recognition and stewardship support.
- Assist in matching potential donors with RBE.
- Support donor engagement to enhance long-term giving and legacy contributions.

c. Administrative Support

- Manage all donations, including restricted and unrestricted contributions.
- Maintain accurate donor records, contribution histories, and distribution documentation.
- Administer fund disbursements in alignment with donor intent and RBE requirements.

d. Reporting, Compliance & Governance

- Provide transparent and timely reporting, including financial statements and fund performance updates.
- Ensure adherence to all applicable legislation, CRA requirements, and RBE policies.
- Maintain audit-ready documentation and high standards of accountability and donor

stewardship.

3. Term

The Initial Term will be for ten (10) years, with the option to extend for two (2) additional five (5)-year Renewal Terms upon mutual agreement of both parties.

4. Volume

Workload is not guaranteed and will fluctuate according to donation activity. In addition to the services outlined herein, the RBE may continue to receive adhoc, and miscellaneous requests that will remain the responsibility of the RBE to manage.

Schedule "B" – Proposal Content Requirements

Proponents should, at a minimum, address the following in their Proposals:

Executive Summary

1. An executive summary stating concisely the main points of the proposal.

Organization Detail

2. A brief description of your organization including any qualifications you consider relevant. This should include, at a minimum, the location of the corporate head office, location of the Canadian head office (as applicable), Saskatchewan presence, and number of years in business.

Relevant Experience

3. A description of a Proponent's experience in performing similar work, including three (3) references of similar work performed in the previous five (5) years, and appropriate contact information for references.
4. In addition, any other experience in the education sector should be outlined.

Capacity

5. RBE expects that you will have sufficient resources available to meet the Requirements of RBE set out in Schedule "A" in a timely and efficient manner. Provide a brief description of how your company will meet the Requirements set out in Schedule "A".
6. Identify and provide a brief description of any sub-Proponents you propose to engage to provide the Goods and Services.

Schedule

7. Proposals should include a confirmation of whether your company can meet RBE's schedule for delivery of the Goods and/or completion of the Services, as set out in this RFP.

Fee Proposal

8. All prices/rates should be quoted in Canadian dollars and should include any customs, duties or tariffs. All prices should be quoted exclusive of the goods and services tax and federal or provincial taxes or other similar taxes, each of which, if applicable, should be stated separately.
9. Any discounts that might apply and any assumptions being made by a Proponent with respect to such discounts, if applicable, should be clearly and prominently stated in the Proponent's proposal.

10. RBE expects that the prices stated in this proposal will encompass the Goods and Services listed in Schedule "A" and shall remain available for 60 days following the deadline for submission of proposals to allow RBE sufficient time to review and evaluate all proposals.
11. Please describe any reimbursable expense categories and other charges and when they would apply. RBE prefers that no mark-up is proposed for reimbursable expenses. RBE expects not to pay any reimbursable expenses or other charges incurred without its prior consent.

Conflict of Interest Disclosure

12. Disclose any actual or potential conflicts of interest that may exist between your organization and its management, and RBE, its directors or employees, and the nature of such conflict of interest. If a Proponent has no such conflict of interest, a statement to that effect should be included in its proposal. RBE's employees are ineligible to participate, directly or indirectly, with any Proponent.

Form of Agreement

13. The agreement will be issued by RBE and will govern the terms and conditions of the services. See Schedule "C" – Contracting Principles.

Confidentiality

14. Proponents are advised that *The Local Authority Freedom of Information and Protection of Privacy Act* (Saskatchewan) does provide protection for confidential and proprietary business information; however, Proponents are strongly advised to consult their own legal advisors as to the appropriate way in which confidential or proprietary business information should be marked as such in their proposal in response to this RFP. **Proponents should identify any information in their proposals that they consider to be confidential or proprietary business information.**
15. Proponents are expected to keep confidential all documents, data, information and other materials of RBE which are provided to or obtained or accessed by a proponent in relation to this RFP, other than documents which RBE places in the public domain. Proponents are expected not to make any public announcements or news releases regarding this RFP or the entering into of a definitive agreement pursuant to this RFP, without the prior written approval of RBE.

Schedule "C" – Contracting Principles

The purpose of this Schedule is to provide Proponents with information regarding certain contracting principles which RBE expects to have included in the definitive agreement with any successful Proponent and/or the contracting principles upon which RBE expects the definitive agreement with any successful Proponent to be based. The following principles are in no way intended to be a complete or comprehensive list of all contracting principles.

These contracting principles include:

- The Proponent shall indemnify and hold harmless RBE, its employees, servants and/or agents from all claims, demands, losses, costs, expenses, damages, proceedings, actions, suits, judgements and liabilities, including all costs of defence and legal fees on a solicitor/client basis, arising out of any infringement or alleged infringement of any patent, copyright, trademark or other proprietary trade secret or breach, or anything done or omitted to be done by the Proponent, its Proponents, officers or employees in connection with the provision of Goods and Services under the agreement.
- The Proponent shall not assign or otherwise transfer its rights, duties and/or obligations under the agreement except with the prior written consent of RBE; any consented assignment or transfer does not relieve the Proponent from any obligations under the agreement. Any assignment or transfer without such consent shall be null and void. RBE shall at all times be entitled to assign or transfer its rights, duties and/or obligations under the agreement to another agency of the Province of Saskatchewan by giving 15 days' notice to the successful Proponent(s).
- The proponent may be required by RBE (in its discretion) to maintain third party liability and, errors and omissions insurance. The minimum amount of insurance will be determined at the time of contract negotiations with the successful proponent
- The agreement resulting from this RFP process shall be governed by the laws of the Province of Saskatchewan and the federal laws of Canada applicable therein.
- The agreement may be terminated:
 - (a) By RBE for convenience upon sixty (60) days written notice to the Proponent; and
 - (b) By RBE upon twenty-four (24) hours written notice to the Proponent and upon the breach of a material provision of the agreement, and payments made or owing under the agreement shall be adjusted pro rata to the date of termination and such termination shall be without prejudice to any other right or remedy that RBE may have.
- RBE will incur no liability, costs or damages to the Proponent for any loss, loss of anticipated profits, costs, damages (of any kind) or any other expense whatsoever suffered by the Proponent as a result of RBE's termination of the agreement for any one or more of the reasons as aforesaid.
- The successful Proponent shall not smoke nor permit any staff to smoke on any RBE property, vehicles or in any school or building owned or occupied by the RBE.

- The RBE requires that Proponents agree that they will not send any employee who does not have a clean criminal record check or vulnerable sector check to any of our schools without first obtaining the approval of the RBE.
- The Proponent hereby covenants that while delivering goods and/or performing services for the RBE, it is an independent Proponent and not an officer, agent or employee of the RBE. The Proponent is responsible to conforming to the provisions of The Saskatchewan Employment Act relating to hours of work, public holidays, annual vacation, minimum wages, and all other related matters, unless otherwise provided by law. The responsibilities for contributions or deductions in respect to Proponent and its employees and agents under the provisions of The Employment Insurance Act, the Canada Pension Plan Act, the Income Tax Act, the Saskatchewan Workers' Compensation Board Act, or any other statute, unless otherwise provided by law, is the responsibility of the Proponent. The Proponent is responsible for any damages that incur to the property of the RBE due to the work involved with this RFP.
- Successful Proponents are required to submit with their invoice each December a current Saskatchewan Workers Compensation Board (WCB) clearance to cover the time period in which the work was completed. Failure to provide a current WCB clearance may result in your final invoice being held until WCB clearance has been obtained. If a WCB clearance is not provided the RBE reserves the right to deduct an appropriate amount of Workers Compensation based on the labor cost for the project from the final invoice.
- All work to be performed within The Occupational Health and Safety Regulations, 1996 pursuant to The Saskatchewan Employment Act, and all successive legislation.

Appendix “A” – Pricing Details

The Proponent shall provide a complete pricing submission outlining all fees, charges, commissions, expenses, and other costs associated with delivering the services described in this RFP. Pricing shall remain firm for the proposed contract term. If pricing is subject to change during any contract year, the Proponent must clearly identify and explain the proposed adjustments.

An example pricing template is provided below; however, Proponents may submit an alternative pricing structure if deemed more appropriate.

For evaluation purposes, RBE will calculate the total potential cost for each Proponent based on the pricing structure and rates provided in their proposal.

Example:

Asset Value Range	Annual Fee (%)	Annual Fee (\$) if Fixed
\$0 - \$1,000,000	_____ %	\$ _____
\$1,000,001 - \$5,000,000	_____ %	\$ _____
\$5,000,001 - \$10,000,000	_____ %	\$ _____
Over \$10,000,000	_____ %	\$ _____

Appendix “B” – Proposal Questionnaire

Instructions

The following are questions RBE would like Proponents to answer as part of their proposal. Submit this Appendix “B” either as pdf or word document as part of your Proposal.

Organizational Profile

1. Describe your organization’s experience in managing legacy funds, endowments, or charitable donations for public-sector or non-profit clients.
2. Identify key personnel who would be assigned to this partnership and outline their qualifications and relevant experience.
3. Describe your governance and oversight structure, including financial controls, investment oversight, and risk management practices.

Experience & Expertise

4. Provide examples of similar partnerships your organization has managed, including scope, duration, and outcomes.
5. Describe your experience with CRA requirements, including charitable receipting, compliance, and reporting.

Service Delivery Approach

8. Describe your approach to establishing and managing legacy (endowment) funds, including investment strategy, fund structure, and distribution processes.
9. Explain how your organization manages restricted and unrestricted donations, including how donor intent is documented and upheld.
10. Describe your donor engagement services, including donor matching, stewardship, recognition, and support for planned giving.
11. Outline your administrative processes, including recordkeeping, communication protocols, and turnaround times for receipting and fund disbursements.
12. Describe the amount of staff time required from RBE to working with your company.

Reporting, Accountability & Compliance

11. Describe the types and frequency of reports you provide to clients (e.g., financial statements, fund performance, donor activity).
12. Provide sample reports or describe the standard reporting format your organization uses.
13. Explain how your organization ensures compliance with applicable legislation, CRA requirements, and audit standards.
14. Describe your approach to maintaining transparency, accountability, and donor stewardship.

Pricing & Value

15. Provide a detailed fee structure, including fund management fees, administrative fees, donor service fees, and any additional charges.
16. Explain any minimum fund size requirements, performance-based fees, or conditions that may affect pricing.
17. Describe any value-added services included at no additional cost.
18. Explain how your pricing model provides long-term value to RBE.

Additional Information

19. Identify any potential risks or challenges associated with managing legacy and donation funds for RBE and describe your mitigation strategies.
20. Describe any innovative approaches or tools your organization uses to enhance donor

engagement, fund management, or reporting.

21. Provide any additional information you believe would support your proposal.