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| ENDEAVOUR VOLUNTEER CONSULTING FOR NON-PROFITS (ENDEAVOUR)  Connected in Motion |
| Statement of Work |
| Connected in Motion |
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| **Strategic Planning and Fundraising Strategy** |
| **Round 16**  **2015** |

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# Executive Summary

This Statement of Work (SOW) is dated as of XXXX between the Endeavour Volunteer Consulting for Non-profits (EVCN) and Connected in Motion (CIM) for the purpose of a strategic planning and fundraising strategy consulting engagement in the Spring 2015 session.

The EVCN provides management consulting to small to medium non-profit organizations to improve organizational capacity and community impact.

CIM is a health-based education group focused on fostering a community of people living with Type 1 diabetes. CIM’s aim is to create a culture of support and engagement in diabetes self-management through peer-based experiential diabetes education and outdoor adventure pursuits. CIM’s long-term vision is to grow the size of the organization by expanding geographically across Canada and in the United States.

The EVCN team will work, in collaboration with the CIM, to address strategic planning concerns and fundraising sustainability by helping CIM develop a 5-year strategic plan, evaluate current and potential revenue streams, and formulate a fundraising strategic document.

The EVCN team proposes a four-phase approach consisting of:

1. Organizational Analysis,
2. Strategic Planning,
3. Fundraising Formulative Evaluation and Revenue Stream Assessment
4. Fundraising Strategy

The EVCN team will provide the following deliverables to CIM:

1. 5-year strategic plan, developed in collaboration with CIM stakeholders
2. Fundraising strategic document, based on an assessment of highest potential revenue streams

# Background

Established in 2009, Connected in Motion (CIM) is a health-based education group focused on fostering a community of people living with Type 1 diabetes. CIM’s aim is to create a culture of support and engagement in diabetes self-management through peer-based experiential diabetes education and outdoor adventure pursuits.

CIM primarily serves adults living with Type 1 diabetes as well as their support network, which includes friends, family members, and health care teams. CIM currently reaches more than 25,000 adults and actively engages more than 1,000 adults per year. From 2008 to 2014, CIM engaged more than 3,000 adults primarily between the ages of 18 and 34. In addition, CIM also serves health care teams directly by providing non-traditional complementary services.

CIM’s core experiential diabetes activities currently consists of:

* *Day program:* One-day events which provide opportunities for individuals with Type 1 diabetes to connect with the community through outdoor adventure and activities. This event is held around 20 times per year.
* *Slipstream Weekends:* Multi-day, experiential education programs to provide skill development and the opportunity to expand comfort zone in relation to outdoor adventure, active living and diabetes self-management. There are three slipstream weekends annually held across Ontario, British Columbia and Nova Scotia.
* *Adventures:* Multi-day, outdoor-based activities which include canoe trips and backpacking series. These events are held around five times a year across Ontario, Alberta and British Columbia.
* *Networking and Online Community:* CIM fosters networking among adults with Type 1 diabetes through day networking events and a connected online community.

CIM’s long-term vision is to grow the size of the organization by expanding this core programming geographically across Canada in six specific regions: Ontario, Quebec, Maritimes, West Coast, Midwest/Prairies, and Northern Canada; and in the United States.

CIM currently has one full time staff (executive director), one part time staff (program coordinator), and three board members. CIM’s governance board is responsible for the organization’s high-level decision-making and has legal authority over CIM. The board consists of a chair, treasurer, and director. In addition to governance, the board also assists with administrative and accounting functions.

CIM’s revenues consist primarily of corporate contributions from diabetes-space sponsors, and event registration fees. CIM’s multi-day events’ costs are primarily covered through these registration fees while corporate sponsorships cover most event management and other overhead costs.

# Problem Definition

We understand that after six years of successful operation primarily in the GTA, CIM has adopted a clear long-term vision of continued growth, to be achieved through expansion of their current program offerings geographically across Canada, and also continued market penetration within existing regions.

However, in order to achieve this long-term vision of growth, CIM faces critical challenges related to strategic and business planning, particularly with regards to fundraising. Specifically, CIM believes that it has maximized or “tapped out” revenue derived from unreliable corporate sponsorships in the diabetes space, and that it must pursue other revenue sources, such as corporate sponsorships in the non-diabetes space, in order to ensure that their future growth is sustainable. CIM has limited resources and experience reaching into these new potential revenue streams.

In summary, to address CIM’s challenges with respect to their long-term vision of growth, we have identified the following key factors to be addressed as part of this engagement:

1. The need for a strategic plan that supports CIM’s stated long-term vision of growth
   1. Articulation of strategic messaging for approaching sponsors
   2. Identification of goals and targets with respect to fundraising
2. The need to evaluate the landscape of current and potential revenue sources
   1. Evaluation of current revenue sources to confirm that they have been maximized
   2. Evaluation of potential revenue sources, to determine which sources are the best targets for CIM to approach
3. The need to develop a fundraising strategy that aligns with CIM’s strategic plan
   1. Development of messaging for approaching sponsors who are in non-Diabetes spaces

# Project Objectives

The principal project objectives established at the outset (in order of priority) are:

1. To develop a 5-year strategic plan for CIM based on the client’s vision for future growth;
2. To evaluate available revenue streams with the intention of identifying the opportunities with the most potential;
3. To devise a marketing strategy for the identified high-potential revenue opportunities; and,
4. To provide tactical advice on implementing the above.

In meeting these objectives, the Endeavour consulting team will work in collaboration with CIM to evaluate the following items:

1. **Overall Strategy:** Develop and define priorities around CIM’s growth strategy as it pertains to expansion to new markets (e.g. Western Canada) and within incumbent markets (i.e. Toronto). Track expansion milestones and identify underlying assumptions.
2. **Revenue Stream Assessment**
   1. **Sponsorships/Donations:** Explore the sponsorship landscape with the intent to define most promising sponsorship opportunities. Currently the Consulting team has identified the following sponsorship avenues: diabetes space corporate sponsors, non-diabetes space corporate sponsors, personal donors, government funding, and foundations.
   2. **Earned Revenue:** Assess the potential of other possible revenue streams, such as building out a full-fledged membership model and selling membership data.
3. **Marketing Strategy:** Inform the marketing strategy based on the above. Provide guidance on messaging and marketing channels.
4. **Implementation Plan:** Develop tactics that would facilitate implementation of the strategic plan. Provide guidance on strategic messaging as it relates to sponsorships. Provide a set of metrics that will help track and evaluate project success.

# Project Sponsors

The Project Sponsors for this engagement will be:

* + - 1. Current CIM leadership: Jen Hanson, Rkin, OCT, MEd (Executive Director)

Jen joined CIM as the Director of Operations in 2009 and has assumed the role of Executive Director of the association for 2 years. Jen will be the primary point of contact for the engagement.

2. EVCN Project Advisor: Richard Harbridge

Refer to Section 12 for more information on the Advisor’s role.

# Project Approach

The Endeavour team is proposing the following approach to meet the goals of the project and deliver recommendations to Connected In Motion:

1. Organizational Review: Reviewing all relevant internal documentation from CIM.
2. Strategic Planning: Developing a high-level 5-year strategic plan.
3. Fundraising Formative Evaluation: Assessing the current status and viability of CIM’s existing fundraising model. (depending on outcome of phase 2)
4. Fundraising Strategizing: Creating a fundraising (and if team capacity permit, revenue) strategy that will help CIM obtain its 5-year objectives. (depending on outcome of phase 2)

These phases will serve as a broad guideline for the progression of the project.

**Phase 1. Organizational Review**

In Stage 1, the engagement team will gather, read, and conduct a preliminary analysis of all relevant international documentation related to CIM’s strategy and operations. This research will serve as a foundations for subsequent research, analysis and synthesis activities conducted in Stages 2, 3 and 4, including the final deliverables.

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| **Objectives** | **Activities** |
| * To obtain a thorough understanding of CIM’s organizational structure, strategies, and operations | * A comprehensive review of all of CIM’s relevant internal documents, including (but not limited to):   + Program and organizational strategy documents.   + Marketing strategy documents.   + Past project proposals and sponsorship pitches.   + Past and current sponsorship grant contracts.   + Corporate, foundation, and government marketing materials.   + Any direct marketing materials (communications geared at individual donors).   + Documentation describing CIM programs.   + Past program evaluations.   + Documents on CIM’s CRM and aggregate profile of participants or donors.   + Demographic and/or psychographic information on participants or donors.   + Financial statements (including past and current year budgets).   + Staff and governance structure documents (including organizational charts, job descriptions, and any other relevant governance materials).   + Charitable bylaws and registration documents.   + Annual Reports. |
| * Preliminary analysis of the above documentation to identify core issues as well as areas where more information is needed. The consulting team will provide follow-up research and analysis on areas with insufficient data either in Stage 1, 2, or 3, as appropriate |

**Phase 2. Strategic Planning**

Stage 2: Strategic Planning, will consist of research, analysis, and the development of a high-level strategic plan to guide CIM’s expansion over the next five years. The plan will also guide the development of a fundraising strategy in Stage 4, in order to ensure that fundraising resources are well-spent toward achieving organizational objectives. In this way, both of these strategic documents will work together to ensure CIM achieves its desire impact of expansion to six regions across Canada and in the United States.

*Note: Transition to Phases 3 and 4 per the Project Approach will be dependent on the outcomes of Phase 2, as agreed-upon between the Endeavour team and CIM.*

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| **Objectives** | **Activities** |
| * Phase 2A - Context Analysis: To provide a complete and detailed context of CIM’s internal and external analysis. | * Data collection and analysis, including the use of existing internal documents review in Stage 1 and (following the development of interview and focus group guides). Potential activities (to be agreed-upon between CIM and the Endeavour team) include:   + 30-minute semi-structured interview with all staff and Board members on CIM’s strategic direction (these can be combined into 45-minute to 1-hour interviews articulated in Stage 3, below).   + 2 x 1.5-hour focus groups with CIM participants in the GTA region.   + Short Google Forms survey to be sent out to CIM participants across Canada and the US (collect 50 survey responses, minimum).   + Analysis of qualitative data.   + SWOT analysis of CIM’s internal environment. |
| * Data collection and analysis on CIM’s external environment. Potential areas of research (to be determined by the Endeavour team) include:   + Diabetes non-profit organizations (partners and competitors) and government agencies in Canada and their key areas of focus.   + Key topics in the field of Type 1 diabetes in Canada today (at national and provincial levels).   + Demographic and psychographic data on people living with Type 1 diabetes in Canada.   + Analysis of diabetes non-profit organizations and government agencies, as well as key topics in diabetes and demographic/psychographic data, in CIM’s target markets in the United States.   + PESTLE analysis.   + Force Field Analysis. |
| * Phase 2B – Development of CIM’s 5-year Strategic Plan: To develop an analytical 5-year strategic plan that will clearly guide CIM’s expansion into 6 regions across Canada and the United States | * Based on document and information shared by CIM, and the research conducted in Stages 1 and earlier in Stage 2, develop high-level goals for CIM’s strategy over the next 5 years, including:   + Overall impact: What CIM will be achieving in 5 years.   + Yearly objectives: What CIM will be achieving in each of years 1, 2, 3, 4 and 5 to ensure that the overall desired impact is realized.   + Metrics for tracking success: The key indicators and/or milestones CIM will track to measure achievement of strategic objectives.   + Articulating a theory of change for CIM’s work. In other words, defining the assumptions CIM’s work is based on, and how its activities and strategy will drive the change it desires to see. (This is important for (a) ensuring the most effective use of resources and weeding out non-strategic work; (b) demonstrating societal value of CIM’s work to government/foundations; and (c) creating a foundation for clarifying CIM’s value proposition).   + A timeline and strategy/rationale for geographic and program expansion, based on our research and target markets identified by CIM (in both Canada and the United States). |
| * Production of a risk management matrix. * Develop draft of the strategic planning document. * Consult CIM Executive Director, staff and Board. Receive input and make modifications, as needed. * Develop the final draft. |

**Phase 3. Fundraising Formative Evaluation and Revenue Stream Assessment**

*Note: Progression into Phase 3 will be dependent on the outcomes of Phase 2 and will be mutually decided upon between the Endeavour team and CIM.*

A formative evaluation is conducted at the beginning of a project to guide and improve the design and ensure a successful outcome. The purpose of this stage is to holistically assess the current status and viability of CIM’s fundraising model, including its existing sponsorship channels and earned revenue streams. This is part of our due diligence in determining the most significant factors constraining the growth needed to fund CIM’s program expansion (see Stage 3). Activities conducted within Stage 3 will focus on gathering and analyzing the necessary data to make an in-depth evaluation of CIM’s model—including areas of high and low performance, and those where more data is needed. In particular, it will include research into diabetes-related corporations to fully determine what extra space may be available for CIM to pursue additional sponsorship within the sector. The outcomes of Stage 3 will support an informed research plan under Stage 4, ensuring that the final fundraising model recommended is evidence-based and well-tailored to CIM’s needs and industry trends.

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| **Objectives** | **Activities** |
| * Phase 3A – Internal Evaluation: To comprehensively examine CIM’s existing fundraising model in order to identify key areas of high performance and low performance (where changes are needed) | * In-depth-analysis of internal documents relating to CIM’s fundraising model, including:   + Financial analysis of fundraising performance (growth/trend analysis, cost-benefit analysis, etc.). |
| * Qualitative research with key stakeholders to contextualize CIM documentation and quantitative analysis:   + Collect data (following the development of interview and focus group guides) (to be determined by the Endeavour team):     - 30-minute semi-structured interview with the Executive Director     - 30-minute semi-structured interviews with fundraising staff     - 30-minute semi-structured interviews with Board members     - Semi-structured interviews with existing sponsors (minimum 2)     - 2 1.5-hour focus group with 5-8 individual donors * Conduct analysis. |
| * Synthesis of all data collected.   + For each fundraising/revenue stream (corporate sponsorships, grants, individual donors, and earned income).   + For the overall program.   + Identification of high and low performance areas for both of the above. |
| * Phase 3B – Diabetes-Sector Sponsorship Research: To better understand the potential for CIM to be awarded additional sponsorship from diabetes-sector corporations | * External market (desktop) research and analysis on opportunities within the diabetes-sector corporate giving market, potentially including:   + The giving profile of CIM’s existing sponsors.   + A list of all diabetes-sector companies (and their business focus) operating in Canada and the United States.   + A giving profile of all companies. |
| * Primary research (potentially including calling and emailing companies, and data requests, to determine their charitable giving requirements and profile). The analysis conducted on this will help determine untapped opportunities CIM could pursue. |
| * Diabetes-sector competitor research.   + Identify the type and value of corporate sponsorships received by CIM’s competitors in Canada and the United States.   + Identify key area of comparative advantage and weaker areas, including where CIM received more (or less) funding than competitors and why. |
| * Phase 3C – Recommendations: To develop recommendations for CIM to pursue, or not pursue, diabetes-sector corporate sponsorship to meet the needs of their strategic plan | * Synthesize internal research on CIM’s fundraising model and external research on the diabetes-sector market. * Develop recommendations on whether or not (and why/how) CIM should pursue additional diabetes-sector sponsorship. * Set parameters for research and strategy development in Stage 4. |

**Phase 4. Strategy Recommendations and Implementation Plan**

*Note: Progression into Phase 4 will be dependent on the outcomes of Phase 2 and will be mutually decided upon between the Endeavour team and CIM.*

The final stage of the engagement is Stage 4. Activities in this stage will be guided by the results of our evaluation of CIM’s existing fundraising model in Stage 3. In this stage, the engagement team will further identify fundraising opportunities based on their ability to contribute to the 5-year strategic plan agreed upon in Stage 2. As per the problem definition, activities will concentrate on the identification of funding opportunities alternative to CIM’s current reliance on diabetes-sector companies, along with key messaging, a strategy for pursuing these opportunities, and guidelines, or recommendations, for implementing the strategy.

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| **Objectives** | **Activities** |
| * Phase 4A – Environmental Scan: To determine the state of charitable giving in Canada and key US target markets, including key areas of opportunity for CIM to leverage | As required (to be determined by the Endeavour team):   * Research/analyze trends in fundraising strategy in Canada and key US target markets. * Research/analyze trends in corporate giving in Canada and key US target markets. * Research/analyze trends in foundation giving in Canada and key US target markets. * Research/analyze trends in government giving in Canada and key US target markets. * Identify key points of leverage for fundraising (e.g., diabetes days of awareness, sporting events, outdoor recreation events, and other relevant trends). |
| * Phase 4B – Analysis of Opportunities outside of the Diabetes Corporate Sector: To determine key factors and/or agencies CIM should seek to fundraise from | As required (to be determined by the Endeavour team):   * Research opportunities (in-kind and monetary) in the non-diabetes corporate space, including (but not limited to):   + Outdoor apparel and equipment.   + Health.   + Outdoor/adventure travel. * Research opportunities in the foundation granting space. * Research opportunities in the government granting space. * Research opportunities for fundraising in other streams, including event-based fundraising, major donors, board fundraising, and individual donors (direct marketing). * Research demand for the type of data in CIM’s CRM (to develop an earned income strategy). |
| * Phase 4C – Strategic Planning: To develop a fundraising strategy to guide the most effective allocation of CIM’s resources and it’s realize it’s potential to collect revenue over the next five years in pursuit of its strategic plan. | * Based on the Phases A and B of this stage, identify the most profitable, cost effective, and sustainable opportunities that CIM should pursue.   + Develop rationale for why these are the best opportunities. |
| * Develop sub-strategies, as relevant, for the following possible fundraising channels. These sub-strategies should include 1, 2, 3, 4 and 5 year targets for some or all of the following:   + Corporate sponsorship (diabetes and non-diabetes sector)   + Foundation granting/partnerships   + Government granting/partnerships   + Major donor giving   + Individual donor giving (direct marketing)   + Event-based fundraising   + Earned income   + Board fundraising |
| * Articulate the overall 5-year strategy, potentially including (to be determined by the Endeavour team):   + Marketing plan, including strategic messaging to communicate to potential donors and/or sponsors.   + Overall expectations and rationale for the projected increase in CIM’s fundraising portfolio if the strategy is followed.   + Metrics for tracking and evaluating success.   + Costs associated with the implementation of the strategy (e.g., implications for staff time and organizational resources).   + Identification of any capacity gaps. * Production of a risk management matrix. |
| * Develop a set of guidelines or recommendations for the implementation of this strategy alongside the overall strategic plan agreed upon in Stage 2, including:   + Best practices.   + Recommended training or capacity building. * Develop draft of the fundraising strategy outcome document. * Consult CIM Executive Director, staff and Board. Receive input and make modifications, as needed. * Develop the final draft. |

# Project Deliverables

Based on the information gathered during the analysis phase, the Endeavour Consulting team will provide the following deliverables to Connected in Motion:

* A 5-year Strategic Plan for CIM inclusive of the following areas:
  1. Expansion into new geographic regions
  2. Required income targets
  3. Success metrics
* (Dependent on progression to Phases 3 and 4) A fundraising strategic document inclusive of the following:
  1. Analysis of potential revenue streams (current and potential) across fundraising, sponsorship, donors, and government grants
  2. Recommendations on the most effective implementation plan to achieve the required income target
  3. Communications strategy for speaking to potential revenue sources in both the diabetes and non-diabetes space

# Project Scope

## Items with-in-scope

Endeavour will focus solely on the issues within the following scope:

* Long-term sponsorship strategy
* Identification and analysis of revenue sources (current and potential)
* Review of current sponsorship strategy
* Communication strategy for non-Diabetes space
* Success measurement metrics
* Analysis of membership models
* Competitor analysis
* High-level fundraising implementation recommendations
* Expansion plans into new geographic areas

## Items out-of-scope

Due to the nature of the engagement and the number of volunteer hours available, the scope of the project will exclude the following. Items in this list will not be analyzed on a standalone basis, but may be touched upon if directly relevant to the project objectives:

* Financial efficiency analysis
* Analysis of CRM database
* Evaluating new product offerings
* Specific fundraising implementation details
* Organizational and human resource strategy
* Resourcing and recruitment
* Design of creative marketing collateral
* Analysis of board members roles

## Assumptions and Constraints

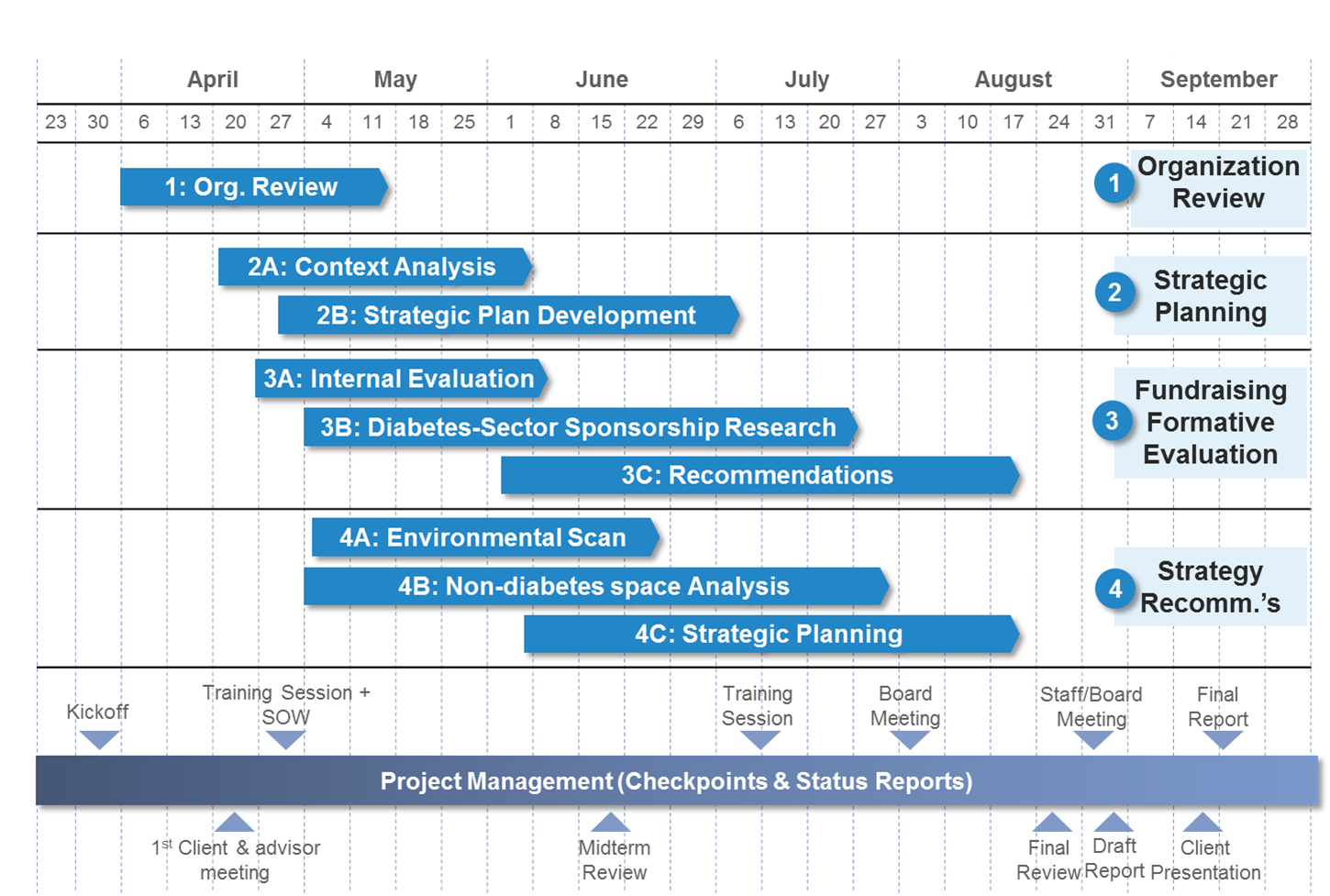
The following assumptions were made in preparing the Project Plan and Deliverables:

* Time for meetings and interviews will be coordinated in advance, in order to meet different schedules of volunteers
* The client will grant and provide access to the Endeavour team, including but not limited to, financial reports, development plans, publications, program guides, participants’ feedback and participant surveys
* The client will provide external stakeholder contact information to the best of their ability
* The Endeavour team will adhere to dates identified in the timeline. If unforeseen circumstances arise, and timelines and deliverables are affected, the team will immediately communicate problems with the client
* The consulting team is committed to contributing 5-8 hour per week on a per member basis for the duration of the engagement
* The client will continue to maintain its operations (going concern)
* The client adheres to a project management approach, meeting milestones and delivering materials at committed timelines
* The client will answer all questions asked by the Endeavour team to the best of their abilities
* Stakeholder participation to facilitate primary research
* Formal and informal feedback mechanisms are in place to allow for frequent revisions and project improvements

The following constraints have been identified and reviewed by the Endeavour team as well as communicated with the client:

* There is no budget available for paid private research papers and informational databases
* The client may have limited resources for implementation; the team will consider these limitations in formulating its recommendations to the client.
* Any unexpected occurrences may lead to reduced commitments by either the client or the team member(s).

# Project Schedule



# Communications Plan

Communications between the EVCN consulting team and Connected In Motion will take place based on the following protocol:

* **Full-scale client meetings**: The team will plan to have at least two (2) full-scale client meetings involving multiple members of the CIM exec / board for the purposes of presenting Interim results/report and the Final Recommendations. These meetings will utilize in-person and conference calling for individuals outside of Toronto, to allow the Endeavour team to provide detailed updates on status, interim deliverables, and ask outstanding questions that require a group-wide consensus response.
* **Status updates**: Bi-weekly status updates by the Engagement Manager or other Consultant as the team designates, either email or conference call as agreed upon discussing current activities, next steps, and following-up on document requests and outstanding questions to be conducted via phone with follow-up emails. These updates will not involve the full Endeavour or CIM teams unless agreed upon.
* Ad-hoc status updates, questions, or logistical arrangements to be conducted either entirely via email, or if via phone to be scheduled first and followed up after via email.
* The engagement manager from EVCN and the President-elect from the CIM remain the primary points of contact for ongoing communications.

# Resource Requirements

## Client Human Resources Available

Key executives and board members of CIM will be made available as needed and as agreed-upon between CIM and the EVCN team in order to complete the objectives of the engagement.

## Client Document Resources Available and Expected

Current and historical financial statements, marketing communication material, 5-year plan, past proposals, sponsorship contracts, member surveys, evaluation data, current by-laws, space for client-consulting team meetings

## Consulting Hours Available

The engagement between the EVCN and the CIM is scheduled to run from March 18, 2015 until no later than September 30, 2015. Team members have committed to the following average time commitment.

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| **Role** | **Name** | **Availability** |
| Engagement Manager | Conrad Lochovsky | 5 – 10 hours per week |
| Senior Consultant | Rocio Laredo | 5 – 8 hours per week |
| Senior Consultant | Alexander Wai | 5 – 8 hours per week |
| Consultant | Albert Albert | 5 – 8 hours per week |
| Consultant | Jesse Firempong | 5 – 8 hours per week |
| Consultant | Tanisha Nathoo | 5 – 8 hours per week |
| Consultant | Yuri Yatsenko | 5 – 8 hours per week |

# Team Structure, Roles, and Responsibilities

## Responsibilities of Consulting Team

### Responsibilities of Engagement Manager

The Engagement Manager plays a pivotal role in addressing the challenges of our non‐profit client during the six‐month consulting engagement. The Engagement Manager is an experienced manager and leader with client experience who has the capability and responsibility for the following items:

* Manages the entire project life cycle, including: diagnosing the client needs through client consultations; defining the problem statement, scope of work and timeline; structuring and executing the problem solving methodology correctly.
* Builds and maintains a close working relationship with the non‐profit client assigned to his/her consulting team.
* Builds and maintains a close working relationship with the project advisor assigned to his/her consulting team.
* Motivates, supports and enables his/her associates (both senior consultants and consultants) to become high performers on the consulting engagement.
* Helps the EVCN to develop and strengthen its organizational capacity to serve our clients and share knowledge among volunteers in the organization.

### Responsibilities of Consultants

* Attending an orientation, mid‐term review session, final presentation event and three training workshops.
* Developing a statement of work based on team consultations with the client and project advisor.
* Research, analysis, and the development of strategic options and recommendations related to the agreed to statement and scope of work.
* Regular meetings with the team, client and advisor.
* Presentations to the client, members of the Advisory Board and Executive Team, and fellow consulting teams.
* Assisting the team in providing monthly progress reports to the Executive Team of EVCN for Non‐Profits.
* Sharing your experiences and feedback with fellow consulting teams and the Executive Team of EVCN.

## Responsibilities of Project Advisor

* Attendance at orientation, midterm and final review sessions during the project life cycle.
* Set expectations at first team meeting around meetings and mode and frequency of communications etc.
* General guidance around where to look for resources.
* General guidance around client management.
* Validating and providing feedback on frameworks.
* The advisor to sign off on change request forms.
* Conduct a detailed review of the final deliverable and sign off on the content before it goes to the client.
* Feedback on potential client projects.

# Deviation Disclaimer

*The Deviation Disclaimer must be completed to indicate whether the Statement of Work (SOW) is a deviation from the client’s initial application. Should there be changes in the SOW, they should be noted to ensure that they client is aware of the scope change and understands the resulting implications.*

# Client Agreement

The following is a template of the Client Agreement signed by the Client and Endeavour Volunteer Consulting for Non-Profits (Endeavour) before commencing the consulting engagement:

*The template can be found online at the Endeavour Knowledge Center website – under Documents – Agreements and Guidelines.*

# Change Request Procedure

Where evaluation of business case for the proposal suggests the proposal may be worthwhile but cannot be achieved without amending the existing plan, the Endeavour Volunteer Consulting for Non-Profits (Endeavour) Change Request Form must be completed. The Change Request Form is designed to assist the Consulting Team, the Executive Team, and the Advisory Board in determining the potential impact of changes to the project timeline in the signed Statement of Work.

*The template can be found online at the Endeavour Knowledge Center website – under Documents – Agreements and Guidelines.*

# Sign-Off on Statement of Work

This Statement of Work is agreed to be complete and sufficient for commencing the consulting project described herein:

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| --- | --- |
| **Connected In Motion  Key Contact** | **Endeavour Volunteer Consulting for Non-Profits Engagement Manager** |
| **Full Name:**  *Hanson, Jen* | **Engagement Manager Full Name:**  *Lochovsky, Conrad* |
| **Position:**  *Executive Director* | **Position:**  *Engagement Manager* |
| **Email:**  *jen@connectedinmotion.ca* | **Email:**  conrad.lochovsky@gmail.com |
| **Phone:**  *(905) 931-2214* | **Phone:**  *416-508-5016* |
| **Signature:** | **Signature:** |
| **Date:** May 10, 2015 | **Date:** |

# Project Contributors

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| --- | --- |
| **Endeavour Volunteer Consulting For Non-Profits (Endeavour)** | **Connected in Motion (CIM)** |
| *Engagement Manager, Conrad Lochovsky* | *Executive director, Jen Hanson* |
| *Senior Consultant, Rocio Laredo* |  |
| *Senior Consultant, Alexander Wai* |  |
| *Consultant, Albert Albert* |  |
| *Consultant, Jesse Firempong* |  |
| *Consultant, Tanisha Nathoo* |  |
| *Consultant, Yuri Yatsenko* |  |
| *Project Advisor, Richard Harbridge* |  |

# About Endeavour

Endeavour Volunteer Consulting for Non-Profits (Endeavour) is a registered Canadian charity that provides management consulting to improve organizational capacity and community impact. We focus on serving non-profit organizations that otherwise cannot afford professional consulting.

Since 2007, Endeavour has recruited and managed more than 300 volunteers to provide management advice to more than 60 non-profit organizations in Ontario, helping communities in many areas, such as the arts, children and family services, disabilities, education, environment, healthcare, immigrant services, rural development, skills training, poverty relief, and youth development.

Learn more about Endeavour at [www.endeavourvolunteer.ca](http://www.endeavourvolunteer.ca/)