| ENDEAVOUR VOLUNTEER CONSULTING FOR NON-PROFITS (ENDEAVOUR) |
| --- |
| Statement of Work |
| Home on the Hill |
|  |
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| **May 9, 2025** |

This project aims to help Home on the Hill better understand their financial situation and devise a plan to use marketing means to communicate their value proposition and generate funding. The document outlines the project scope, deliverables, and phases for successful delivery by August 2025.

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# Executive Summary

Home on the Hill (HOTH) was founded in 2011 by a group of families who saw firsthand the lack of long-term housing and support for loved ones living with severe mental illness. Motivated by personal experience and a strong sense of community, they came together to create a stable, caring environment where individuals could live with dignity and support. Today, HOTH offers housing, life skills programs, and caregiver resources at no cost to ensure that those who need help the most can access it without barriers.

HOTH is currently facing a financial crisis following an expansion enabled by one-time grants. With a projected funding gap of $60,000 over the next year, the organization is seeking to stabilize operations and build a sustainable future. Its revenue streams (primarily Bingo proceeds, Trillium grants, and crowdfunding) are insufficient to support long-term planning. Compounding this issue is a lack of financial oversight tools and internal marketing capacity needed to attract new donors or funding partners.

Endeavour Consulting is partnering with HOTH to deliver a marketing plan focused on sustainability. The engagement will involve assessing the organization’s current financial position, fleshing out the value proposition, and developing a marketing plan to help HOTH become more competitive in seeking financial resources. The project will also clarify HOTH’s value proposition and develop messaging that appeals to funders, donors, and the broader public.

Over five phases, the project will deliver actionable recommendations and a phased roadmap. These will include target audience strategies, marketing recommendations, and an analysis of similar nonprofit models. While direct implementation support (e.g., content development or grant writing) is outside the scope, the engagement will build a strong foundation to help HOTH align its mission with achievable, sustainable outcomes.

# **Background**

Home on the Hill (HOTH) is a family-founded, non-profit organization established in 2011 to address the urgent need for affordable, supportive long-term housing and services for individuals living with serious mental illness. Rooted in lived experience and driven by a community-centered approach, the organization was created by families who recognized the gaps in long-term care and support for their loved ones and others facing similar challenges. HOTH works with both individuals living with mental illness and their caregivers.

Mission

* Home on the Hill is committed to improving the quality of life for individuals with severe mental illness and their families through a holistic and inclusive model of care. Its mission is to:
* Provide a caring and stable long-term home environment for persons with severe mental illness.
* Offer support services, life skills training, and programs that foster recreational, educational, and social integration.
* Support families through educational resources and emotional guidance, grounded in a family model of care.
* Promote public awareness and understanding of severe mental illness.

HOTH currently employs an executive director, a recreational therapist and a cook, the rest are on a volunteer basis. HOTH is seeking guidance to become financially stable and self-sustaining. The primary funding sources for HOTH include “BINGO” funding from rental housing, Trillium grants and community-based crowdfunding. It is important for HOTH to continue to offer services at no cost in order to limit barriers for individuals looking to engage with their services.

# Problem Definition

Home on the Hill is a grassroots non-profit providing supportive housing and services for individuals with severe mental illness. HOTH expanded operations in response to the improved funding situation and increased one-time grants and currently is facing a financial crisis to sustain the expanded and varied operations. They are currently trying to raise $CAD 60,000 over the next 12 months to maintain the current level of activity and employees.

**Key problems include:**

* *Single Source of Revenue Streams with Increasing Expenditures* : HOTH’s revenue streams are primarily driven by funding, which are needed to cover various expenditures for its core operations. Current funding sources—Bingo revenues, Trillium grants, and crowdfunding events—are limited and insufficient for long-term planning and growth. Based on historical financials over the past 3 years, expenditures increased significantly year-over-year, with salaries and benefits being the biggest cost driver. Initial conversations with the client also indicate a lack of visibility and deep understanding of the current financial situation, as well as financial projections for the next 5 years.
* *Limited Marketing Capacity and Resources to Secure Future Grants*: The organization lacks the internal expertise and resources to effectively capture, communicate, and market its value to attract new donors, partners, and supporters. This is crucial to HOTH’s continuous success as revenue streams heavily rely on grants, but challenges have been met in the past securing current grants.

# Project Objectives

The Endeavour Consulting team’s overall objective is to provide HOTH with a comprehensive strategy for marketing, positioning the organization for long-term sustainability. It enhances its ability to secure ongoing and diverse funding sources through better communication of the value proposition. The strategic plan will focus on aligning HOTH’s mission and vision with practical, achievable solutions, including marketing strategies, client engagement and financial position.

Diversifying Revenue Streams and Implementing Performance Management Framework:

* Assess HOTH’s current financial position and identify ways to monitor financial performance and enhance performance review process to support decision-making
* Evaluate existing community fundraising efforts and recommend marketing strategies that can be implemented without additional resources
* Explore how partnerships could be leveraged beyond the current short-term grants model (e.g., diversify revenue stream through individual donor campaigns, corporate sponsorships, and social enterprise opportunities)

Enhancing Client and Community Engagement:

* Increase engagement from the community, caregivers, and potential donors to ensure long-term operational sustainability.
* Develop strategies to position HOTH as a credible and valuable investment for future funding opportunities by emphasizing its unique service model, including long-term, stable care and individualized recreational therapy for clients with schizophrenia and other severe mental health disorders.
* Leverage existing strengths in family support and lived experience to create more meaningful community outreach efforts that engage potential donors, partners, and clients
* Recommend ways to use social media platforms (e.g., Facebook, Instagram, TikTok) to increase visibility and community involvement, translating into potential revenue opportunities.

# **Project Sponsors**

Maggie Veltheer - Executive Director

Julia MacKay - Volunteer

Lesley Block - Volunteers and Board member

# **Project Approach**

#### Phase 1: Strategic Clarity

The first phase of the project will focus on building a deep understanding of HOTH’s financiallandscape and the external environment it operates within. The goal is to identify systemic barriers to sustainable funding and to uncover opportunities for improved outreach.

* Value Proposition & Positioning
* Clear articulation of the organization's unique value in the ecosystem
* Messaging framework to guide fundraising and outreach
* Impact metrics and storytelling points that resonate with funders and partners
* HOTH’s current programs (supportive housing, recreation, and family support)
* Current partnerships and referral networks (e.g., hospitals, churches)

This phase will also explore how HOTH’s current position compares to other mental health and supportive housing nonprofits.

**High-Level Financial Analysis**

* Summary of current costs, revenue sources, and financial runway
* Identification of funding gaps and sustainability risks
* Exploring monetization potential of existing programs (e.g., speaker series, art/music therapy)

**Team Roles & Responsibilities**

* Overview of current staff capacity and structure
* Internal budgets and program cost breakdowns
* Clarity on roles tied to fundraising, outreach, and operations
* Review of financial models from similar organizations
* Identification of key gaps or duplications

#### Phase 2: Understand funder expectations and assess HOTH’s unique value proposition

In this phase, Endeavour will explore how HOTH is currently perceived by funders and community stakeholders, and what potential supporters might be looking for. The goal is to surface insights that could help HOTH better position itself for funding and resource partnerships. The team will also evaluate how well HOTH communicates its differentiators and value add to key stakeholders, including funders, partners, and the broader public. The focus will be on the effectiveness of its current marketing and communication assets.

This will include:

* Identifying key characteristics and expectations of past funders (e.g., Trillium Foundation, real estate board)
* Event-based outreach strategies (e.g., speaker sessions, caregiver programs)
* Exploring reasons for grant rejections (e.g., Trillium’s criteria evolution)
* Messaging clarity around HOTH’s long-term impact and unique care model

**Phase 2 information sources:**

* Interviews with potential and past donors (with introductions from HOTH)
* Landscape research on similar organizations’ funding models
* Exploration of successful nonprofit social enterprise models for mental health (e.g., peer-led businesses)
* Review of all available public-facing materials
* Comparative analysis with other nonprofit marketing assets
* Interviews with internal stakeholders responsible for outreach

#### Phase 3: Synthesize findings and develop actionable recommendations

Once all data and stakeholder perspectives have been gathered, the team will synthesize insights into clear, actionable recommendations for HOTH. These will focus on both near-term and longer-term solutions that align with the organization’s vision and capacity.

Key deliverables will include:

* Recommendations for messaging and communication improvements (marketing for improved funding diversification)
* Identification of new target audiences and engagement strategies
* Marketing recommendations to improve revenue stability and future grant readiness

#### Phase 4: Final presentation and report

In the final phase, Endeavour will present the team’s findings and recommendations to HOTH in a clear and concise format. A final report will be delivered along with a presentation summarizing key insights, proposed strategies, and an implementation roadmap.

The report will include:

* Executive summary
* Research findings across all phases
* Practical recommendations with prioritization
* A roadmap including potential timelines and resource considerations
* Appendices with interview insights and benchmarking details

# **Project Deliverables**

**Recommendations**

* Suggested channels or mediums for outreach (e.g., email, in-person, digital platforms) and target audiences
* Summary of pros and cons for each option

**Financial Assessment of Current State**

* Overview of existing revenue streams and funding mix
* Analysis of reserve levels and monthly cash burn rate

**Marketing plan**

* Phased marketing action plan (e.g., 0–3 months, 3–6 months, 6–12 months)
* Cash flow implications for each phase
* Prioritization of activities based on urgency and ROI potential

# **Project Scope**

## **Items with-in-scope**

The following activities and analysis are in scope for this project:

* Review of financial health: assessment of run rate, cost structures, and key revenue streams and levers
* Analysis of internal spending: team structure, board roles and alignment, and resource capacity
* Comparative landscape assessment: strategy and decisions from other similar organizations (Allied Home)
* Marketing strategy

## **Items out-of-scope**

The team has determined the following items as out of the scope for this engagement, given Endeavour’s guidelines, time, and resources available:

* Marketing content development or implementation
* IT support such as website, social media, or Eventbrite setup
* Staff hiring, HR restructuring, or directing operations management
* Grant writing or application support
* Fundraising strategy
* Evaluation of fundraising alternatives: grants, events (e.g., Bingo), donors, partnerships
* Assessment of past fundraising strategies

## **Assumptions and Constraints**

**Assumptions**

* HOTH will be actively involved during the course of the engagement and provide any requested materials on time
* The Endeavour Consulting Team’s participation will cease upon final delivery of project deliverables.
* Key internal stakeholders (such as board members, staff, and volunteers) will cooperate and collaborate with the Endeavour Consulting Team when required, given reasonable notice and agreed upon requirements.
* There will be ongoing communication (such as emails and weekly meetings) between HOTH and the team for research, updates, and project reviews.
* HOTH understands in-scope and out-of-scope items outlined by the Endeavour team.
* HOTH’s key internal stakeholders will respond to surveys and requests for information/data in a timely manner, as agreed upon with the Endeavour Consulting team to ensure that the project remains on track.
* Documents, data, and materials provided by HOTH will not be distributed or shared outside of the Endeavour Consulting team and will be kept confidential.
* The Endeavour Consulting team will adhere to dates specified in the engagement timeline. If unforeseen circumstances arise, and timelines and deliverables are affected, the team will communicate with HOTH immediately to identify a solution.

**Constraints**

* Each Endeavour team member has commitments to part-time or full-time employment and/or education separate from their commitment to HOTH during the project timeline; deliverables may be completed outside of normal business hours.
* HOTH has limited resources (including human resources) during the time they are engaging with the Endeavour Consulting team on this project.
* Meetings and work for HOTH will be conducted and completed outside of normal working hours, unless otherwise agreed upon by both the Endeavour Consulting Team and HOTH.
* There is a 6-month time constraint for this engagement between HOTH and Endeavour Consulting Team.
* The Endeavour Consulting Team has identified a tentative targeted completion date of August 2025.
* The Endeavour Consulting Team acknowledges that due to limited resources, the marketing strategy may be implemented partially and will take that into consideration when designing the marketing strategy

# **Project Schedule**

**Phase 1 (May): Strategic clarity**

**Key activities**

* Gather essential data from HOTH (financial reports, marketing materials, partner info)
* Understand value proposition and community impact
* Complete an in-person visit

**Phase 2 (June): Financial analysis**

* Current funding sources and runway
* Program-level cost breakdowns
* Staffing structure and internal roles

**Phase 3 (July): Funder insights and messaging review**

* Conduct interviews with past/potential funders if feasible
* Evaluate clarity of messaging through current materials
* Benchmark against similar organizations

**Phase 4 (August): Recommendations and final delivery**

* Synthesize findings to draft recommendations on messaging and outreach strategy

# **Communications Plan**

* The communications between the team and HOTH will include video conferences, emails, and phone calls.
* From the Endeavour Team, Seemi Qaiser (Engagement Manager) will serve as the primary contact, and Christine Luk (Senior Consultant) will serve as the backup point of contact.
* Maggie, Julia, and Lesley will be the primary contacts from HOTH.
* Meetings between the team and HOTH will take place weekly on Wednesdays between 7-7:30 PM or on an as-needed basis.
* The team will respond to any communications from HOTH within 24-48 hours. Upon receiving a submission from the team, HOTH will respond promptly.

# **Resource Requirements**

## **Client Human Resources Available**

Maggie Veltheer or Julia Mackay or Lesley Block will be available for X hours per week (to be confirmed with client).

## **Client Document Resources Available and Expected**

Resources:

* Mission
* Strategic Plan
* Annual report 2023
* Financial statement 2023
* Marketing materials

## **Consulting Hours Available**

Each member of the Endeavour Consulting team will be available 5-6 hours per week until the end of the project.

The engagement between Endeavour Consulting and HOTH will occur between April 2025 and September 2025.

# **Team Structure, Roles, and Responsibilities**

## **Responsibilities of Consulting Team**

### **Responsibilities of Engagement Manager**

* Ensure team input and contribution
* Ensure the team understands and maintains focus on the deliverables
* Ensure completion and approval of the Statement of Work (SOW)
* Ensure the timely deliverable of work tasks as per the SOW
* Delegate tasks
* Track and report progress
* Act as the first point of contact for the team and client
* Raise issues as appropriate
* Approve changes as required

### **Responsibilities of Consultants**

* Develop the Team Charter
* Contribute to the development of the SOW
* Contribute to project deliverables
* Complete project tasks on time ensuring quality work is produced
* Present client deliverables as requested and appropriate
* Raise issues as appropriate
* Practice document version control for all documentation
* Notify Engagement Manager of any obstacles or potential obstacles preventing timely
* completion of client deliverables
* Inform Engagement Manager of the status of work deliverables and any problems/issues

## **Responsibilities of Project Advisor**

* Guide and advise the project team
* Monitor progress and identify gaps
* Clarify deliverables for the next meeting
* Evaluate the final report and presentation
* Approve the SOW

## **Responsibilities of Knowledge Broker (if applicable)**

# **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**

Please see last page. This Statement of Work is agreed to be complete and sufficient for commencing the consulting project described herein:

| **<Client *(insert client name here)*> Key Contact - Executive Level[[1]](#footnote-0)** | **Endeavour Volunteer Consulting for Non-Profits Engagement Manager [[2]](#footnote-1)** |
| --- | --- |
| **Full Name:**  *<Last name, First name, Middle Initials>* | **Engagement Manager Full Name:**  Seemi Qaiser |
| **Position:**  *<title>* | **Position:**  Engagement Manager |
| **Email:**  *<client@email.com>* | **Email:**  seemiqaiser@gmail.com |
|  |  |
| **Signature:** | **Signature:**  Seemi Qaiser |
| **Date:**  *<mm/dd/yyyy>* | **Date:**  05/09/2025 |

# **Project Contributors**

| **Endeavour Volunteer Consulting For Non-Profits (Endeavour)** | **Home on the Hill (CO)** |
| --- | --- |
| **Seemi Qaiser** *Engagement Manager* | **Maggie Veltheer** *Executive Director* |
| **Christine Luk** *Senior Consultant* | **Julia McKay** *Volunteer* |
| **Brody Zhao** *Consultant* | **Lesley Block** *Volunteer and Board member* |
| **Ben Haddon** *Consultant* |  |
| **Jimmy Zhu** *Consultant* |  |
| **Soumyendu Saha** *Consultant* |  |
| **David Kao** *Project Advisor* |  |
|  |  |

# **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/)

1. Key Contact - ***Executive Level:*** *This individual has the authority to bind your organization in a consulting agreement with Endeavour and to make decisions for your organization.* [↑](#footnote-ref-0)
2. **Engagement Manager:** *Only sign after the project advisor has reviewed and approved the Statement of Work* [↑](#footnote-ref-1)