



THE CITY OF
WATERTOWN
Watertown Public Library

**REQUEST FOR PROPOSALS (RFP)
FUNDRAISING CONSULTANT SERVICES**

CAPITAL CAMPAIGN PLAN

Advertise Dates: Tuesday, January 31, 2017 and February 7, 2017

Proposals Due: Tuesday, February 28, 2017 at 3:00PM CST

Proposal Notification Deadline: Friday, February 24, 2017

Anticipated Finalist Interviews: The week of March 20, 2017

CONTACT PERSON: Peg Checkai
Watertown Public Library Director
100 S. Water St.
Watertown, WI 53094
pcheckai@watertownpubliclibrary.org

To be considered for selection:

A. Proposals must be received on or before 3 p.m. on **Tuesday, February 28, 2017** at the address listed above. All proposals must have labeled on the envelope, **“Fundraising Services – Watertown Public Library.”** A complete submission shall consist of twelve (12) copies of the proposal in hard copy and a copy of the proposal submitted on a USB drive.

B. **You must notify the Library Director via email if you plan to propose on this project no later than close of business on Friday, February 24, 2017.**

INTRODUCTION

The Watertown Public Library Board of Trustees requests proposals from fundraising consultants interested in managing a capital campaign project to raise funds in support of building an addition, renovating the existing library and creating space for community focused activities.

Estimated project costs are \$11 million.

Fundraising activity will occur June 2017 through June 2020.

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The purpose of this Request for Proposal is to employ a fundraising consultant who will:

- Design a fundraising campaign plan
- Work in collaboration with The Watertown Public Library Fundraising Committee, the Library Board of Trustees, the City of Watertown, and our architects.
- Manage the fundraising campaign
- Track progress and ensure that the campaign remains a priority.

PROJECT OVERVIEW

The Watertown Public Library expansion and renovation project has been under development since 2000 with the completion of a Needs Assessment, followed by Needs Assessments in 2006 and 2013. Conceptual architectural plans were completed in 2009 and 2015. In 2014, the Library Trustees hired Rick McCarthy, Architect with Studio GC, Chicago IL, to explore building options at the Library's current site. The Library completed the conceptual design phase of the building initiative in April, 2016. The conceptual plan, designed by Studio GC, Chicago IL, maximizes the use of the current site, and shows a single level 21,200 sq. ft. addition with renovations to the current 23,000 sq. ft. building. Estimated costs of \$11million.

Most recently, the following question was presented to voters on the November 8, 2016 election ballot:

“Shall the City of Watertown approve an addition/renovation of the Watertown Public Library at a total cost not to exceed \$7,300,000, with the City providing up to 60%(4,385,000) of the cost?”

The referendum passed with over 60% of the voters supporting the referendum question. The referendum was advisory and references projected costs of 7.3 million. The Library Board's vision is to raise funds for an 11 million dollar project.

Project tasks completed to date include:

- Space needs assessments
- Experience with an architect familiar with our goals
- Feasibility study
- Conceptual drawings of the updated facility
- Library site visits
- Two presentations to the city council
- A good relationship with community foundations
- Community support to proceed with project

The following website link contains the Library and Community Center project information to date in detail.

<http://www.watertownpubliclibrary.org/Section/LibraryExpansion/index.html>

PROPOSAL REQUIREMENTS

A. Cover Sheet

The cover sheet should be no more than one page in length. Please include the following information:

- Name, title, address, email address and phone number of the lead consultant, as well as, the names of relevant project team members.
- Name and address of the firm applying.
- Location of firm headquarters if different from the site applying.
- Number of years the firm has been operating.
- Number of employees.
- On an additional sheet, list a minimum of four (4) but no more than five (5) similar projects with references that the RFP Committee may contact. Include contacts from non-profits or municipal clients.
- Each reference shall include contact information for someone with the client agency who was directly involved with the project when it was underway and is able to provide information on current project status.

B. History, Experience, and Track Record

Please address the following topics. Detailed and succinct responses are appreciated.

- Provide a summary of the qualifications, experience and skills that your project team members could offer to this project.
- Cite examples of previous capital campaigns that highlight your experience. Please include community information such as population, location, important considerations, as well as the size of the campaign and the amount raised.
- How does your firm stand out from all others and why should we choose your firm? Provide aspects of your experience or capabilities that we should consider.

C. Proposal Submission—Proposals submitted in response to this request shall contain at a minimum the elements listed below. Additional material may be submitted at the consultant team's discretion.

Please provide a proposal plan describing all areas of service that your firm would provide. The topics below should be addressed in addition to any other relevant aspects that you foresee and are needed to provide a successful project. Detailed and succinct responses are appreciated.

- A plan for determining if the fundraising goals set are reasonable and attainable.
- Outline the expectations for the local organizations involved during the fundraising process.
- Given your firm's location, provide a communication plan that will ensure an effective fundraising strategy for our community.
- Provide a realistic estimate of anticipated percent of time that key proposal staff will spend physically in our community.
- Please provide a brief plan/schedule of activities including an explanation of how you will proceed. Will this include assistance in developing campaign materials?
- Explain how your project will support clients who do not have a large infrastructure for fundraising.

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- Describe your unique strategy for identifying and cultivating major donors for the Watertown Public Library expansion and renovation project. (Suggestions: The Library's 110th anniversary in June, 2017, and Watertown's connection to the First Kindergarten in the United States.)
- Provide a detailed explanation of how your project would prepare volunteers for fundraising activities including pursuing and seeking donations from a range of potential donors from key stakeholders to their neighbor. How will you develop donor tracking and assist with donor recognition?
- Explain how you will convey progress to committee members and how often. Will you communicate via telephone, skype, in person (with/without travel expenses), other?

D. Fee Schedule

Each proposal shall contain a firm cost estimate for the work contained within this project. Actual contract cost will be negotiated with the selected consultant based upon a negotiated scope of work and personnel assignments. Identify all charges for the services listed above. Include an estimated cost for the entire campaign. Identify all reimbursable expenses such as transportation, lodging, meals, office supplies, printing, special products, etc. and provide a brief justification for each line item on the fee schedule.

- Explain how your fees or operating expenses (management, staff, per diem travel, video, website, promotion, brochures, etc.) are calculated.
- The fee schedule should include all expenses.

E. Conflict of Interest Statement

Submit a statement describing any potential or apparent conflicts of interest relating to other clients you may have, or relating to officers, directors, or employees of the Watertown Public Library or the City of Watertown that could be created by providing services to this project. Indicate what procedures will be followed to detect and notify the Watertown Public Library Expansion Committee of any conflicts and how conflicts of interest would be addressed.

1. Initial Evaluation

Each proposal shall receive an initial evaluation by the RFP Evaluation Committee using the proposal requirements noted above. No more than three (3) finalists will be identified.

2. Consultant Interview

Up to three (3) finalists will be invited to interview with the RFP Committee.

Named key personnel are required to participate in the interview.

Consultants invited for the interview process shall explain and support their written proposal through a presentation and question/answer forum. "The Project Manager" is expected to take an active part in making the presentation at the firm's interview. The Project Manager is defined as a person having day-to-day responsibility to conduct the project work or to very closely supervise the work of others working on the project. Your firm may include other key people you feel will aid in the interview process. Each

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interview will last 60 minutes with 30 minutes allotted to the presentation and 30 minutes for questions.

Consultant Interviews will be evaluated on the following criteria:

- A. **EXPERIENCE AND QUALITY OF LIKE WORK:** Proposals should demonstrate related experience in providing services for similar projects. The proposal shall include a minimum of four (4), but no more than five (5) similar projects with references.
- B. **CONSULTANT TEAM:** Consultant's proposed project organization and staffing shall demonstrate experience and qualifications in providing requested services.
- C. **DESIGN APPROACH:** Proposals shall include a description of consultant's approach for this project. A description of the anticipated project approach including technical and management factors that lead to a superior product and operation.
- D. **SCHEDULE:** The consultant's proposed time-line shall be provided in the proposal. Prior experience with adhering to proposed schedules shall be demonstrated. The proposal shall demonstrate the firm's ability to undertake this project with respect to other on-going projects.
- E. **COST:** Each applicant shall submit their total cost for Professional Fee and Reimbursement Expense on company letterhead. **COSTS ARE TO BE BROKEN OUT PER TASK.**
- F. **EVALUATION:** The Watertown Public Library Board of Trustees will use Quality Base Selection (QBS) Process to determine the successful proposal. All proposals will be reviewed for completeness. The RFP Evaluation Committee may be made up of the following members; the Library Director, library staff, and selected members of the Watertown Public Library Board of Trustees or selected members of the Friends of the Library Board. The RFT Evaluation Committee will use the following criteria to evaluate the proposals and award the contract:

Evaluation Criteria	Weight
Experience and Quality of Like Work with References	25%
Consultant Team, Team Personnel	20%
Design Approach	10%
Schedule	10%
Interview	10%
Cost	25%
TOTAL	100%

Proposed Timeline:

Activity	Time	Date
RFP Released	N/A	January 31, 2017
Intention to propose	5:00 pm -CST	Friday, February 24, 2017
Submissions of Proposals Due	3:00 pm- CST	February 28, 2017
Library Board Interview Determination	5:30 pm	March 9, 2017
Consultant Interviews	TBD	Week of March 20, 2017
Library Board Approval	5:30 pm	April 13, 2017
Contract Agreement Process	TBD	April 17, 2017
Anticipated Contract Start Date		June 1, 2017
Successful Fundraising Goals Met		June 2020

SUBMISSION OF PROPOSALS

All proposals shall be submitted in complete original form. No faxed or emailed proposals will be accepted. Proposals shall be sealed and marked “**Fundraising Services – Watertown Public Library.**”

Consultants shall submit twelve 12 copies of their proposal in paper form. *A single copy of the Consultant’s Service Fee Schedule shall be delivered in its own separate sealed envelope and included within the rest of the proposal submission package.*

Consultants shall also submit one (1) version on USB drive that is compatible with Microsoft Office 2010 software.

Sealed Proposals must be received on or before **3 p.m. on Tuesday, February 28, 2017.**

Peg Checkai
 Library Director
 Watertown Public Library
 100 S. Water St.
 Watertown, WI 53094

Proposals received after 3:00 p.m. on Tuesday, February 28, 2017 will be rejected.

SPECIAL NOTES

- **Collaboration**

The Consultants shall work cooperatively and in collaboration with the City of Watertown which includes the Watertown Public Library Capital Campaign Committee, the Library Board of Trustees and Watertown Common Council during all phases of this project. The Consultant is expected to attend all

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necessary meetings with the City of Watertown. The Consultant is expected to attend and provide updates to the City of Watertown.

- **Incurred Costs**

The City of Watertown is not responsible for any costs incurred by the Consultant in the preparation of the proposal, participation in the interview, or any other costs to the Consultant associated with responding to the RFP.

- **RFP Release and Changes**

This RFP will be posted on the City of Watertown's website under "Bid Requests and RFP's" in the *Watertown Daily Times* under Legal Notices on Tuesday, January 31, 2017 and Monday, February 7, 2017 and on the Watertown Public Library's website under the Expansion tab. The City of Watertown reserves the right to change these dates.

- **Consultants** are encouraged to check the website for information on the project and changes to the RFP or schedule. Electronic copies of the RFP will be provided upon request. Send your request to:

Peg Checkai, Watertown Public Library Director at
pcheckai@watertownpubliclibrary.org

- **Submission of Questions**

Questions shall be submitted **only** in writing via email using the subject line "Library Expansion and Renovation Project" to:

Peg Checkai, Watertown Public Library Director at
pcheckai@watertownpubliclibrary.org

Phone inquiries will not be accepted

END