



WAUKESHA PUBLIC LIBRARY

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Request for Proposal Feasibility Study and Capital Campaign

1. Introduction

The Waukesha Public Library is requesting submissions from Fundraising Consultants interested in implementing both a Feasibility Study and Capital Campaign to raise funds to renovate the first floor of the library. The Library has a goal of raising \$1.5 million from private sources towards a \$5 million library renovation. The Library seeks the assistance of an organization or individual who has a proven track record in the ability to complete effective feasibility studies, conduct capital campaign planning studies, as well as to develop and execute successful campaigns. The purpose of this RFP is to identify a Fundraising Consultant who will:

- Undertake a capital campaign feasibility study;
- Design a fundraising campaign plan;
- Work in collaboration with the Waukesha Public Library, the Library Board of Trustees, the City of Waukesha, and the Library's architects;
- Manage the fundraising campaign; and
- Track progress and ensure that the campaign remains a priority.

2. Project Overview

The Waukesha Public Library was founded in 1896 through the support of a local women's group, the Beacon Lights Club. Over the decades the Library has been the beneficiary of private support, including a gift of \$15,000 from Andrew Carnegie to build the original library building in 1904, now a room in the current Library.

In 2018 the Waukesha Public Library completed a new strategic plan which included a new Library Mission:

Waukesha Public Library champions the power of reading and learning to enrich, empower, and engage all in our community.

And Vision:

The heart of a thriving city, the Library connects and inspires the community to transform lives.

To meet the Mission and Vision, the Library identified five major goals. This RFP addresses two of those goals. One goal is to renovate the library to better meet current community needs. Currently the library has one small meeting room with a capacity of about 85 people and no additional small group rooms. Community input indicates a strong desire for both larger and more meeting spaces. In 2012 and again in 2019, the Waukesha Public Library worked with architects at Engberg Anderson Architects to prepare a Predesign and Cost Study for a renovation of the first floor of the Library. The 2019 study included an expanded meeting room, a new Makerspace, additional small group meeting rooms, a renovated front entry, and a redesigned Carnegie Room, restoring the library's historic 1904 original structure as a library showpiece. Costs for the entire project are approximately \$5 million.

A second goal is to greatly increase means of private support for the Library. Despite serving a community of over 70,000 in an affluent County, the Library does not have Foundation support. The Library envisions this capital campaign project as a means of both supporting the renovation as well as starting a practice for future private campaigns to support additional capital projects. Recently the Library created a fund under the direction of the Waukesha County Community Foundation (WCCF). At this time the Library does not plan to start a foundation, and will use the services of the WCCF to manage its funds. The Library is seeking \$1.5 million in private funding to support the first floor renovation; the feasibility study should also indicate potential and realistic funding amounts for the Library in the future.

Currently, completed project tasks include:

- Predesign Study and Cost Estimate
- Experience with an architect familiar with our goals
- Conceptual renderings and floorplans of updated first floor
- City support in five-year capital budget for library renovation (approximately \$3.5 million over three years)

3. Objectives

- Test basic planning assumptions with potential donors. How do potential donors view the Waukesha Public Library? Do they consider WPL's goal of creating a modern library facility important enough to place on their priority giving list?
- Identify steps the Library needs to take to best meet goals of a capital campaign.
- Create and expand a donor prospect list. Develop a prospective donor list to include a balance of lead donors, major donors, and other sources, including private foundations and grants, if applicable.
- Determine potential campaign support. By assessing prospective donors and evaluating solicitation capabilities of Board members and key staff, determine a realistic campaign goal.
- Identify other potential campaign leadership volunteers. Interview potential volunteers to determine their individual solicitation capability.

- Set a realistic campaign goal.
- Determine campaign strategies. Develop implementation strategies.
- Develop a plan for soliciting individuals. Using information gained through interviews between consultant and donor prospects, design a step-by-step strategy for engaging individuals and securing generous priority gifts.
- Implement and monitor capital campaign, working with Library Staff, Trustees, Volunteers, and the City of Waukesha
- Prepare a written fundraising campaign plan. Utilizing all information gathered through a variety of methods including those listed above, compile a comprehensive and detailed recommendation for meeting the campaign goals.

4. Deliverables

- Case for Support. Provide documentation and precedent in support of the proposed strategy.
- Feasibility Study Summary Report. Realistic assessment of capital campaign likelihood of success, identifying current strengths and weaknesses. Summary report should recommend course of action on whether to implement capital campaign, and/or the steps needed before a capital campaign will be successful. The Library anticipates that the Feasibility Study will effectively advise actions in preparation for a successful capital campaign.
- Donor Prospects and Volunteer Prospects Lists. Within the lists, identify priority prospects across a full and diverse range of donor and solicitation levels.
- Capital Campaign Plan. Outline a capital campaign plan that includes time and dollar goals, prioritized donor segments, recommended solicitation strategies, and tools for training volunteers and staff, campaign pyramid anticipating segmented goals from lead donors, major donors, private sector, foundations, etc.
- Campaign refinement. After delivery, refine the campaign plan considering input from key staff, Board members, and solicitation volunteers.

5. Proposal Format and Scope

Respondents are required to furnish one original, one electronic, and five copies of the proposal. The proposal must be limited to a maximum of 10 pages, not including staff resumes. Estimated price and terms for service shall be provided, listing a breakdown scope of services.

The proposal should address:

- Description of the firm: Structure, areas of expertise, time in business, number of employees, and other data that helps to characterize the firm; addresses of the main office and the office that will manage the project.
- Experience: Briefly describe three projects for relevant and recent public sector clients for whom you provided similar work in the last five years. For each project listed, provide the name, address, and contact name of the client's representative who can be

contacted regarding your performance. Include the name of the lead firm in cases where you worked in partnership.

- Provide a list of capital campaigns managed for public libraries.
 - Describe how the firm will become familiar with the Library's demographics. Describe any work completed with an exhibiting with a similar demographic.
 - Provide at least three references from library, non-profit, or municipal clients.
- Personnel: Provide professional resumes for the main people to be assigned to the project. Include those of consultants and describe their relevant experience. Describe responsibilities of key people. Identify the person who would be the primary contact point for the client. Provide an organizational chart of the project team.
- Provide a narrative description of how the firm proposes to execute the project. Descriptions of experience with similar projects that demonstrate effective work are welcome, as are brochures that would help evaluate the firm (brochures included as examples of the firm's work may exceed the ten-page limit). Submit a statement on why you believe you are the best qualified to carry out the project. Your narrative description should discuss how the firm would address:
 - The Library's real and perceived strengths and weaknesses in fundraising;
 - The community's perception of the Library;
 - Identification of who the Library's allies are;
 - Identification of leaders in the fundraising effort, both within the Library community and among residents;
 - Names of potential major donor/funders and what their interests might be;
 - Identification of the amount of money that can be reasonably raised;
 - Other purposes the findings can serve;
 - Identification of capital campaign strategies, including promotional activities such as online portals, brochures, etc.
 - Expectations and the role of Trustees, staff, and volunteers will take in the study and campaign working with the vendor;
 - Training required to fill leadership and volunteer positions
- An itemized menu of services broken down by phase and cost.
- Time frame required for completion of various parts of the project and project as a whole.

Vendors agree to the attached list of City of Waukesha Terms and Conditions.

6. RFP Responses

Responses to the RFP must be received by 3 pm on Friday, November 15, 2019, and should be directed to the Waukesha Public Library, ATTN: Bruce Gay, Library Director, 321 Wisconsin Ave., Waukesha, WI 53186. Electronic copies may be submitted on a flash drive or through email to bgay@waukesha-wi.gov.

7. Timeline for RFP process

- Friday, October 18, 2019: RFP Released.
- 3:00 pm, Friday, November 8. Questions concerning RFP must be received. Questions may be sent to Bruce Gay at bgay@waukesha-wi.gov.
- Friday, November 15, 2019. RFP Addendum with answers to questions emailed to vendors. If your firm is interested in receiving the responses to questions received, you must contact Bruce Gay by this date.
- 3:00 pm, Friday, November 22, 2019: Vendor RFP responses due.

The Waukesha Public Library Board of Trustees reserves the right to make the final decision on this RFP, including the right to award no contract at all. The Board may choose to conduct interviews of vendors as part of the selection process. The Board anticipates a decision no later than at its January 9, 2020 regular meeting.

8. Consultant Selection

Proposals will be evaluated and scored by the Waukesha Public Library Board of Trustees in its sole discretion based on the following criteria:

- 25% Design approach—quality and completeness of plan.
- 25% Experience and Quality of Like Work.
- 20% Value/ROI for Budget
- 15% Experience of vendor team personnel
- 15% References