



Preliminary Outline of Services and Estimated Budget for Capital Campaign Counsel for Waukesha Public Library

CAPITAL CAMPAIGN PLANNING & COUNSEL SERVICES

Campaigns are typically designed in two phases: the Quiet Phase and the Public Phase. The Quiet Phase involves the solicitation of lead and major donors through individual, face-to-face meetings. About 85-95% of your campaign goal should be obtained in this phase. Following the Quiet Phase, the campaign is announced in the Public Phase and solicitation proceeds with broad, public appeals, including direct mail, events, social media campaigns and other initiatives to secure smaller levels of gifts. Typical capital campaign counsel includes the following activities; specific scope of work for the Waukesha Public Library will be finalized with the services contract.

Campaign Preparation and Leadership Development (2 months)

- Recruit Campaign Chair(s) and Campaign Solicitation Committee
- Clarify Roles and Responsibilities (including Library staff, Friends & Foundation)
- Identify and hire campaign support (typically a ½ time administrator)
- Develop Gift Acknowledgment, Database, and Reporting Systems
- Develop (or review) Campaign Communication Plan
- Clarify the Campaign Goal, Gift Chart, and Naming Opportunities
- Develop (or review) the Case Statement
- Prospect Identification / Solicitation Strategies
- Quiet Phase Kick-Off
- Train Campaign Volunteers (3-4 hours, onsite)

Campaign Counsel (Quiet Phase: 6 months; Public Phase: optional as needed, 2-3 months)

After the Kick-Off meeting and the launch of the Quiet Phase, Library Strategies will be available as needed to monitor the campaign and assist in any additional refinements or activities. These could include:

- Management of Steering Committee meetings
- Development of donor identification/cultivation/solicitation strategies
- Coaching and donor visits (as needed)
- Assistance with cultivation and solicitation of corporate and foundation support
- Ongoing monitoring of campaign progress
- Oversight of stewardship and donor recognition

- Assistance with development and coordination of Public Phases activities, including events, publicity, marketing, reporting, etc. (as needed)
- Assistance with grant writing (as needed)
- Graphic design of print or digital media (as needed)

ESTIMATED BUDGET

The following budget estimates are based on a typical capital campaign project, with an expedited timeline. For Waukesha Public Library, final Monthly Retainer amounts will be based on actual services selected per contract.

	Option 1: Invoice Actual Hours and Non-Travel Expenses *	Option 2: Invoice Monthly Retainer *
Capital Campaign Preparation and Leadership Development (estimated 2 months, from project start through Quiet Phase Kickoff)		
<i>1.5-2.0 consultant days per month, including onsite monthly meetings</i>	Consulting days/hours: \$1,600/day or \$200/hour	\$3,000 per month (not to exceed 16 hours/month)
Capital Campaign Quiet Phase (estimated 6 months, from Quiet Phase Kickoff through launch of Public Phase)		
<i>1.0-1.5 consultant days per month, including onsite monthly meetings</i>	Consulting days/hours: \$1,600/day or \$200/hour	\$2,250.00 per month (not to exceed 12 hours/month)
Capital Campaign Public Phase (estimated 2-3 months, optional)		
<i>0.5-1.0 consultant day per month</i>	Consulting days/hours: \$1,600/day or \$200/hour	\$1,500.00 per month (not to exceed 8 hours/month)

* Estimated Travel Expenses per onsite meeting/visit (monthly estimates only, billed actual)	
1 trip, Minneapolis to Waukesha, WI (325 miles x 2 plus incidental miles; \$0.56/mile)	\$224.00
2 nights hotel at \$110/night (per consultant)	\$220.00
2 days per diem at \$61/day (per consultant)	\$122.00
Estimated Monthly Travel-related Expenses	\$566.00

KEY PERSONNEL



KAREN ROSE has been fundraising for over 20 years. She has served in development leadership positions for higher education and social service organizations and as a consultant providing development and campaign counsel to libraries, schools, museums, social service agencies, churches and youth organizations. She has also conducted strategic planning services to libraries and communities, including countywide collaboratives and state library training programs.



STU WILSON has served as a consultant with Library Strategies since 2007. Previously, he served as Director of the Friends and Foundation of the Hennepin County Library (Minneapolis) and Vice President of The Friends of the Saint Paul Public Library. Wilson brings years of experience in library fundraising, including capital projects and development plans, he has developed more than 40 strategic, development, and marketing plans for libraries, and has trained numerous library and foundation boards.



DAVID KATZ is a Project Manager with Library Strategies. He has broad experience in communications and library programming, as well as Friends administration and membership campaigns. He is also a research consultant with the Minnesota Historical Society. Katz holds a Master's degree in Library and Information Science (MLIS) from the University of Wisconsin Madison.

Throughout the course of the capital campaign activities, appropriate support may be provided by other members of the Library Strategies team. This additional expertise may include, but is not limited to: Marketing, Communications Strategy, and Project Management. Library Strategies reserves the decision to determine scope of work and participation for other experts incorporated from our team.