

Feasibility Study and Capital Campaign Request for Proposal (RFP)

I. Introduction

The Waunakee Public Library requests proposals from fundraising consultants interested in managing a capital campaign that will raise a portion of the funds necessary to construct a new library facility. The potential site could accommodate a library up to 38,500 square feet in size. Construction could begin as early as 2017 with initial cost estimates ranging up to \$14,000,000.

The fundraising consultant will:

- Conduct a feasibility study to determine a potential campaign goal in early 2015
- Design and manage a fundraising campaign plan
- Track progress and ensure the campaign remains a priority
- Work in collaboration with the Village of Waunakee, the Waunakee Public Library Board, and a Capital Campaign Committee

II. Project Overview

In October 2014, the Waunakee Public Library Board confirmed its interest in constructing a new library facility on a portion of a land parcel known as Waunakee Alloy and located within the Village of Waunakee. This portion had been offered to the Waunakee Village Board for purchase by a developer d/b/a At Home Again. It is expected that the site will qualify for Brownfields Clean Up grants.

Prior to accepting the Alloy property, the Village Board contracted with an architect to confirm that the site could accommodate the developer's project and a new library facility. The Library Board plans to interview architects and move forward with creating a design for a new library in 2015.

III. 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, e-mail 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 in operation

- On an additional sheet, a list of at least three, but no more than ten, references from the most recent campaigns conducted by your firm, and no more than ten that the RFP Committee may contact.

B. History, Experience, and Track Record

Please address the following topics. There is no page limit to this section, however succinct responses are appreciated.

- Provide a summary of the qualifications, experience, and skills that your team members offer this project.
- List your three most recent feasibility studies that led to capital campaigns. Include the overall goal of each project, the amount raised, and what, if any, factors contributed to the shortfall. Please include demographics.
- Describe work your firm has performed for any Waunakee organization in the past, and your knowledge of the Village of Waunakee and its demographics.

Please discuss how you would address the following:

- The role Library Board members and Library staff would be expected to take in the study and in a campaign
- A timeline to raise the stated amount of money
- Identification of any and all costs associated with managing the capital campaign

C. Proposal Plan – What will be done

Please provide a proposal 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 needed to provide a successful project. There is no page limit to this section, however, succinct responses are appreciated.

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- A plan for determining if the fundraising goals are reasonable and attainable
 - A communication plan between the Library Board and staff, the Campaign Committee, and your organization
 - The specific individuals who will be assigned to the contract; include a resume for each individual mentioned
 - Explain how you will support clients who do not have an administrative staff for fundraising.
 - Percent of time your key proposal staff will physically spend in our community
 - Please provide a brief plan/schedule of the feasibility study and capital campaign activities.
 - Describe your strategy for identifying and cultivating major donors for the Waunakee Public Library project.
 - What role will volunteers play in the feasibility study and in the campaign? How are volunteers trained for fundraising activities?

D. Fee Schedule

Please provide your fee structure and also identify all reimbursable expenses, such as transportation, lodging, meals, office supplies, printing, etc.

E. References

F. Conflict of Interest Statement

Please 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 Waunakee Public Library or the Village of Waunakee that could be created by providing services to this project. Indicate what procedures will be followed to detect conflicts and to notify the Waunakee Public Library.

IV. Evaluations

A. Initial Evaluation

Each proposal shall receive an initial evaluation by the RFP Committee. No more than five (5) finalists will be identified. The Committee may request additional information or request personal interviews with one or more vendors.

B. Vendor Interview

Up to five (5) finalists will be invited to interview with the RFP Committee **in late January 2015. Named key personnel are required to participate in the interview and provide contact information for references from the last three campaigns for the proposed personnel who will be assigned to the feasibility study and the campaign.**

Vendors 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 role in making the presentation during the firm's interview. The project manager is defined as a person having the day-to-day responsibility of conducting the project work or to very closely supervise the work of others working on the project. Each firm may include other key people to assist in the interview process. Each interview will be limited to 60 minutes; 40 minutes for the presentation and 20 minutes for questions.

SUBMISSION OF PROPOSALS

Vendors shall submit an electronic proposal in pdf format no later than 3:00 p.m. on January 9, 2015 to: Susan Hedrick at shedrick@waunakeepubliclibrary.org. **Proposals received after 3:00 p.m. on January 9, 2015 will be rejected.**

SPECIAL NOTES

- **Collaboration**

The vendor shall work cooperatively and in collaboration with the Village of Waunakee, which includes the Waunakee Village Board and staff, Waunakee Library Capital Campaign Committee, and Waunakee Public Library Board, during all phases of this project. The

vendor is expected to attend all necessary meetings with the Village of Waunakee.

- **Waunakee Public Library reserves the right to:**

- Reject any and all proposals received as a result of this RFP.
- Waive or decline to waive any informalities and any irregularities in any proposals or responses received.
- Negotiate changes in the scope of work or services to be provided.
- Select the vendor it deems to be most qualified to fulfill the needs of the Waunakee Public Library. The vendor with the lowest bid will not necessarily be the most qualified, since factors other than price are important in the determination of the most acceptable proposal.

- **Incurred Costs**

The Village of Waunakee is not responsible for any costs incurred by the vendor in the preparation of the proposal, participation in the interview, or any other cost to the vendor associated with responding to the RFP.

- **All proposals and other materials** submitted shall become the property of the Waunakee Public Library. No reports, information, or data given to or prepared by the selected proposer shall be made available to any individual or organization by a respondent or the selected proposer without prior written approval of the Waunakee Public Library.

- **Contracts**

The selected vendor may be required to enter into a written contract using the Village of Waunakee's approved form. All information contained in this RFP and acceptable provisions of the proposer's response will be attached to and made part of the executed contract.

- **Responsibility for Materials**

The selected proposer will be required to assume responsibility for all goods and services offered in the proposal, whether or not the proposer produces them.

- **RFP Release and Changes**

This RFP was posted on the public notices page of the Village of Waunakee website, <http://www.vil.waunakee.wi.us/bids.aspx>, on December 15, 2014. The Village of Waunakee reserves the right to change these dates and will post the changes on the project's website. Vendors are encouraged to check the website regularly. Electronic copies of the RFP will be provided upon request. Send requests to Susan Hedrick at hedrick@waunakeepubliclibrary.org.

- **Questions**

Questions shall be submitted via e-mail, using the subject line "Library Feasibility Study," to: Susan Hedrick at shedrick@waunakeepubliclibrary.org.