



# Irvin L. Young Memorial Library

## REQUEST FOR PROPOSAL FUNDRAISING CONSULTANT SERVICES LIBRARY BUILDING PROJECT CAPITAL CAMPAIGN

### INTRODUCTION

The Irvin L. Young Memorial 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.

Construction of an expansion and renovation of the building is slated to begin in 2024. Estimated project costs are \$5.1 million. Fundraising activity will occur in 2022 and 2023.

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 Irvin L. Young Memorial Library Expansion and Renovation Steering Committee, the Library Board of Trustees, the City of Whitewater, and Studio GC architects.
- Manage the fundraising campaign.
- Track progress and ensure that the campaign remains a priority.

Proposals must be received by **Friday, February 11, 2022 at 5:00 p.m.**

### PROJECT OVERVIEW

The Irvin L. Young Memorial Library expansion and renovation project has been under development since 2002 with the completion of a needs assessment in 2003, followed by needs assessments in 2012 and 2017. Conceptual architectural designs were completed in 2007, 2014, 2016, 2018. In 2020, the Library Trustees hired Rick McCarthy, architect with Studio GC of Chicago, to explore building options at the Library's current site. The conceptual design phase of the building initiative was completed in 2021. The conceptual plan will add a 7,000 sq. ft. addition with renovations to the current 14,000 sq. ft. building for an estimated cost of \$5.1 million.

On December 21, 2022, the Whitewater Common Council voted 6-1 in favor of a resolution to support the project.

Now, therefore, **BE IT RESOLVED** as follows:

1. *The City of Whitewater is authorized to contribute \$3,000,000 to the above-described project [the upgrade, expansion and renovation of the Irvin L. Young Memorial Library.]*
2. *The City of Whitewater's \$3,000,000 contribution is contingent upon the Library providing documentation to the City that it has sufficient funds to pay for the balance of the project.*



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3. *The City of Whitewater's \$3,000,000 contribution will be made no earlier than January 1, 2024.*

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

This website [link](#) contains Library project information to date in detail.

### III. PROPOSAL REQUIREMENTS

- **Cover Sheet**

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

1. Name, title, address, email address and phone number of the lead consultant, as well as the names of relevant project team members.
2. Name and address of the firm applying.
3. Location of firm headquarters if different from the site applying.
4. Number of years the firm has been operating.
5. On an additional sheet, a list of at least three references and no more than ten that the RFP Committee may contact.

- **History, Experience, and Track Record**

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

1. Provide a summary of the qualifications, experience and skills that your project team members could offer to this project.
2. 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.
3. 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.



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- **Proposal Plan**

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

1. Plan for determining if the fundraising goals set are reasonable and attainable with effort available.
2. Outline the expectations for the local organizations involved during the fund-raising process.
3. Given your firm's location, provide a communication plan that will ensure an effective fund-raising strategy for our community.
4. Provide a realistic estimate of anticipated percent of time that key proposal staff will spend physically in our community.
5. Explain how your project will support clients who do not have a large infrastructure for fundraising.
6. Please provide a brief plan/schedule of activities including an explanation of how you will proceed.
7. Describe your unique strategy for identifying and cultivating major donors for the Irvin L. Young Memorial Library expansion and renovation project.
8. 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 neighbors.

- **Fee Schedule**

Identify all charges for the services listed above which you are able to provide.

Please also 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. No page limits.

1. Please explain how your fees or operating expenses (management, staff, per diem travel, video, website, promotion, brochures, etc.) are calculated.
2. Does the fee schedule include all expenses?

- **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 Irvin L. Young Memorial Library or the City of Whitewater that could be created by providing services to this project.

Indicate what procedures will be followed to detect and notify the Irvin L. Young Memorial Library Expansion and Renovation Steering Committee of any conflicts and how conflicts of interest would be addressed.



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## 1. Initial Evaluation

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

## 2. Vendor 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. Interviews will take place during the week of March 7-11, 2022.**

Vendors invited for the interview process shall explain and support the 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 interview will last 60 minutes with 30 minutes allotted to the presentation and 30 minutes for questions.

**Vendor Interviews will be evaluated on the following criteria:**

- Explanation and support of the written proposal
- Ability and willingness to work with involved committees
- Ability to best fulfill the needs of the project

TIMELINE		
Activity	Time	Date
RFP Released	9:00 a.m.	January 18, 2022
Submissions of Proposals Due	5:00 p.m.	February 11, 2022
Vendor Interviews	TBD	March 7-11, 2022
Contract Agreement Process		April 2022
Anticipated Contract Start Date		May 1, 2022
Successful Fundraising Goals Met		September 1, 2023

## SUBMISSION OF PROPOSALS

All proposals may be emailed to Library Director Stacey Lunsford at [slunsford@whitewater-wi.gov](mailto:slunsford@whitewater-wi.gov). Proposals must be submitted no later than 5:00 p.m., Friday, February 11, 2022.

**Due to current circumstances, if your firm is having trouble meeting the deadline, please contact the Library Director as soon as possible.**



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## SPECIAL NOTES

- **Collaboration**

The Vendor shall work cooperatively and in collaboration with the City of Whitewater which includes the Irvin L. Young Memorial Library Expansion and Renovation Steering Committee and the Library Board of during all phases of this project.

- **Incurred Costs**

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

- **RFP Release and Changes**

This RFP was posted on the public notices page of the Irvin L. Young Memorial Library and the City of Whitewater websites on Tuesday, January 18, 2022. The Library Board of Trustees reserves the right to change these dates and will post the changes on the Library and City websites. Vendors are encouraged to check the website for information on the project and changes to the RFP or schedule.

- **Submission of Questions**

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

Stacey Lunsford, Irvin L. Young Memorial Library Director  
[slunsford@whitewater-wi.gov](mailto:slunsford@whitewater-wi.gov)