

Request for Proposal for Capital Campaign Planning Study  
for the Alice Baker Memorial Public Library

P.O. Box 520  
820 E. Main Street  
Eagle, WI 53119

Introduction

The Library Board of the ALICE BAKER LIBRARY is considering a capital campaign to raise funds to renovate and expand the existing library located at 820 E. Main Street, Eagle, WI 53119 from 4,000 square feet of space to 16,000 square feet of space. Based on a needs assessment, building program study, and conceptual drawings developed by FEH Associates, an architectural firm, and Himmel & Wilson, we anticipate the entire project will be as much as \$4.6 million. The Library Board hopes to raise needed funds principally through private donations.

The Board of Library Trustees seeks the assistance of an organization or individual with expertise and experience in conducting capital campaign planning studies to assess the fundraising capacity for this project and also identify potential individual donors and volunteers for a campaign.

Project Description

Organized in 1974 with a dedicated group of citizens of the town and village of Eagle, the Alice Baker Library was begun. Starting in one room of the Methodist Church in 1974, moving to a small two-story building in 1984 and to its present location in 1994, the library has grown in part due to community support. In 2012, the Alice Baker Library Board embarked on a new strategic direction for the library.

The motto of "*The Little Library with Big Ideas*" is the library's theme for the 21st. century.

Eagle has been predominantly agricultural, with the State Forest being a significant feature. The community is divided between two school systems.

VISION STATEMENT

The Library Board of the Alice Baker Memorial Public Library envisions the library as a destination which serves as a civic space encompassing the roles of public library and community gathering place.

MISSION STATEMENT

It is the mission of the Alice Baker Memorial Public Library to provide open and equal access to information, resources, and services in order to meet the informational, educational, cultural, and recreational needs of the community. Resources are delivered in a user-friendly and service-oriented manner. The library fosters the spirit of exploration, the joy of reading, and the pursuit of knowledge for all ages.

Our mission statement is anchored by the following assumptions:

- provide information in a variety of formats
- be responsive to the public's needs
- promote reading, literacy, and lifelong learning
- offer space for people and ideas to come together
- embrace the rich heritage of the community
- and uphold the public's freedom of access to information

To advance the library's mission we value:

- collaboration, civic engagement and social responsibility
- sustained productive partnerships
- transparent accountability
- sound financial stewardship
- innovation, imagination, and creativity
- informing, enriching, empowering

### SERVICE ROLES

The Library Board of the Alice Baker Memorial Public Library and the Library Director and staff chose the following responses:

#### **VISIT A COMFORTABLE PLACE: Physical and Virtual Spaces**

Residents and visitors will have safe and welcoming physical spaces to meet and interact with others or to sit quietly and read and will have open and accessible virtual spaces that support social networking.

#### **SATISFY CURIOSITY: Lifelong Learning**

Residents and visitors will have the resources they need to explore topics of personal interest and continue to learn throughout their lives

#### **CELEBRATE DIVERSITY: Cultural Awareness**

Residents and visitors will have programs and services that promote appreciation and understanding of their personal heritage and the heritage of others in the community.

#### **MAKE INFORMED DECISIONS: Health, Wealth, and Other Life Choices**

Residents and visitors will have the resources they need to identify and analyze risks, benefits, and alternatives before making decisions that affect their lives.

#### **DISCOVER YOUR ROOTS: Genealogy and Local History**

Residents and visitors will have the resources they need to connect the past with the present through their family histories and to understand the history and tradition of the community.

### Funding

It is anticipated that building campaign monies will be handled by the Waukesha County Community Foundation. The Friends of Alice Baker Library group is a 501 (c) (3) organization and will help raise money towards interior furnishing/finishing and perhaps landscaping.

### Project Approach

Describe your firm's approach for a capital campaign planning study.

It is expected that the fundraising consultant will work early in the process with library stakeholders including, but not limited to – Library Board, staff, Friends of the Alice Baker Library in Eagle, elected officials from the Town of Eagle and the Village of Eagle, and the public. A public presentation of the findings of the study will be expected on or before January 31, 2013. It is expected that the findings will provide analysis and conclusions relating to the Alice Baker Library, the project, and giving. There should be recommendations for a campaign goal, design, strategies, case statement, and public relations.

### Proposal Content

The proposal will be organized to provide the following information:

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 five recent projects executed by the firm to demonstrate experience relevant to the proposal. List relevant public sector clients for whom you have performed similar work in the past five years. For each project listed, provide the name, address, and a 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 or in an auxiliary capacity.

Personnel: Provide professional resumes for the key people to be assigned. Include those of consultants and describe their relevant experience. Describe proposed 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.

Project Approach: 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 your firm. Submit a statement on why you believe your firm is best qualified to carry out the project.

Fee: What is your fee for conducting a campaign planning study? State any other charges the firm would make and expenses for which reimbursement would be sought, including the method for determining the charge. The firm selected to provide services for the capital campaign planning study may or may not be the firm used in a capital campaign management role if the Library Board chooses to go in this direction. Cost proposals for the capital campaign planning study should reflect this approach.

The content of all proposals must conform to the following:

Proposers must respond to the questions in the order presented and may provide additional supporting documentation pertinent to clarification of the proposal.

All responses to this Request for Proposal should address the following issues:

1. How long have you been in business and how many capital campaign feasibility studies have you completed?
2. Have you completed a feasibility study for a library and if so, which ones?
3. How familiar are you or your firm with Eagle and its demographics? Describe any work you have done with any Eagle organization in the past.
4. What is the success rate of projects/organizations for which you have done feasibility studies?
5. What is the cost of your services?
6. Please describe your present workload. Would there be any problem taking on this project?
7. Please provide at least three references from non profit or municipal clients.
8. Please discuss in your response how your feasibility study would address the following:

The library's real and perceived strengths and weaknesses in fundraising  
The community's perception of the library

Names of potential major donors/funders and what they might be interested in  
Identification of the amount of money that can be reasonably raised  
In addition to determining how much money can be raised, what other purposes does the feasibility study findings report serve?  
What other major fundraising campaigns are launching that might compete for the same donors?  
Possible alternatives for raising funds

What role would Board members and staff and the Friends of the Library have to take in the study and in a campaign?  
What training would be required to fill leadership positions and committee selections?  
What is an appropriate timeframe for both the campaign planning study and the fundraising itself?  
Identification of how long it will take to raise the stated amount of money

#### Project Schedule

The capital campaign feasibility study to determine a campaign goal and strategies for the Alice Baker Memorial Public Library should be completed on or before January 31, 2013.

#### Bid Procedure

Fifteen copies of the response to the Request for Proposal should be submitted in a sealed envelope, clearly identified as "PROPOSAL FOR CAPITAL CAMPAIGN PLANNING STUDY" must be received by 5:00 pm on September 14, 2012 mailed or personally delivered to the Alice

Baker Memorial Public Library. Proposals received after the deadline will be automatically rejected and will be returned to the proposer unopened.

The Library Board of the Alice Baker Library reserves the right to reject any or all proposals, or informally negotiate certain points of the final contract with the qualified firm or individual.

#### Schedule

The Library Board of the Alice Baker Library will use the following tentative schedule for the selection process:

August 17, 2012	Distribution of Request for Proposal
September 4 and 6, 2012	Pre-proposal Open House/Walk-thru (1:30 pm)
September 14, 2012	Proposals Due
September 17 - 21, 2012	Select Firms for Interview
October 1 - 5, 2012	Schedule Interviews
October 19, 2012	Award Contract
January 31, 2013	Completion of capital campaign planning study

#### Selection Process

Proposals will be reviewed by the Library Board of the Alice Baker Library and perhaps others selected by the Library Board. Interviews may be held with representatives of firms submitting RFPs. The evaluation process may include interviews with some or all of the respondents and/or visits to the respondent's office. Selection will be based on these factors:

- The firm's list with a brief description of comparable projects
- Other relevant Experience
- Firm history and background
- Project team qualifications
- Familiarity with the area and the project
- The firm's existing workload
- Accessibility to and location of the firm
- Cost

#### Cost of Proposal

The Library Board of the Alice Baker Library is not liable for any costs incurred by the proposer in the preparation and production of the proposal or for any work performed prior to the execution of a contract. All proposals become the property of the Library Board of the Alice Baker Library.

#### Additional Information

The library expansion feasibility study final report may be e-mailed if requested. Annual reports and the building plans and the 2008 - 2010 long range plan are posted on the library's web site at <http://www.alicebaker.lib.wi.us>.

Proposers who have questions concerning the submission of proposals, RFP process, and/or specifications or scope of work must contact:

Alli Chase  
Library Director, M.L.S.  
Alice Baker Library  
P.O. Box 520  
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Eagle, WI 53119  
262-594-2800  
chase@eagle.lib.wi.us

The Alice Baker Library is an equal opportunity employer. Businesses owned and operated by minorities or women are encouraged to submit proposals. Proposers to whom a contract is awarded shall not discriminate on the basis of age, race, color, national origin, gender, creed, or disability.