



Burlington Public Library

166 East Jefferson Street, Burlington, Wisconsin 53105

Phone: 262-342-1130

www.burlingtonlibrary.org



REQUEST FOR PROPOSALS **Financial Feasibility Study**

OVERVIEW

The Burlington Public Library Board of Trustees plans to engage in a capital campaign to finance an \$8.9 million renovation of the library. The Library Board intends to raise these funds through City funding, fundraising, donations, foundations, grants, and any other available money.

PURPOSE

The Burlington Public Library seeks proposals from qualified consultants to conduct a fundraising feasibility study towards the development of an upgraded, modern library. After a recent master planning project, the Board has established a goal of replacing the 1987 library addition with a larger two-story addition that will more fully integrate with the neighboring Wehmhoff Square Park and preserve the original landmark 1917 post office building that forms the core of the library facility.

This fundraising study should determine how much capital can realistically be raised for this project, and in what duration of time. Additionally, the study will identify potential partners, or partnership strategies, challenging, lending and finance options, and other issues or roadblocks for the organization to consider. Finally, the consultant would develop a plan outlining the cost of ongoing campaign counsel as the project moves forward.

ORGANIZATIONAL BACKGROUND

In 1908 the Burlington Library Association formed the first Burlington library, which became the city library in 1913. The library serves a population of nearly 11,000 residents in the city of Burlington, as well as more than 9,000 residents of several surrounding municipalities. The library is a member of the Lakeshores Library System and the SHARE Consortium, a cooperative group of 24 public libraries in four counties in Southeastern Wisconsin.

The library owns 62,000 volumes and subscribes to 117 periodicals. It has a collection of over 2,000 audiobooks, 1,300 music CDs, as well as a collection of over 6,500 DVDs. The library also hosts a large collection of about 2,500 large print books. Annual circulation for the library is about 160,000.

The library is staffed by 16 part-time and 4 full-time staff, totaling 10.5 Full-time Equivalent staff positions. The library is open 64 hours per week, Monday through Sunday, during the school year.

Our mission is to connect all community members with access to diverse resources, engaging experiences, and the opportunity to grow. Our vision is a community hub that facilitates learning, inspires imagination, and strengthens the community we serve.

LIBRARY BUILDING PROJECT BACKGROUND

The current library building began its life as a U.S. Post Office in 1917. When the post office relocated in 1963, the building was repurposed as a library. An addition completed in 1987 added additional space for library collections.

The library strategic planning processes in 2006 and 2019 revealed that the existing space was insufficient for the broad range of purposes that the community currently uses the library for, including studying, browsing, meetings, programs, and more.

A master facility planning process conducted by FEH Design in 2020 on behalf of the Library Board of Trustees identified a goal of replacing the 1987 addition to the library with a larger two-story addition that would tie into the historic 1917 building.

OBJECTIVES AND DELIVERABLES

Objectives

The feasibility study is the consultant's primary deliverable. The following areas are required to be addressed:

- **Testing of basic planning assumptions with potential donors.** How do potential donors view the Burlington Public Library? Do they consider Burlington Public Library's goal of creating a modern library facility important enough to place on their priority giving list?
- **Expansion of prospect list.** Develop a prospective donor list to include a balance of lead donors, major donors, private foundations, grants, City funds, and potentially direct mail public solicitations.
- **Determining 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.** Identify strengths and weaknesses with respect to attaining campaign goals. Propose strategies for implementation.
- **Develop a plan for soliciting individuals.** Using information gained through confidential interviews between consultant and donor prospects, design a step-by-step strategy for engaging individuals and securing generous priority gifts.
- **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.

Deliverables

- **Situation Analysis.** Utilizing various methods, including those listed above, inventory assets, challenges, and opportunities related to the campaign.
- **Case for Support.** Provide documentation and precedent in support of the proposed strategy.
- **Donor Prospects and Volunteer Prospects Lists.** Within the lists, identify priority prospects across a full and diverse range of donor and solicitation levels.
- **Campaign Plan.** Outline a capital campaign plan for the option most likely to receive full funding 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, City sources, foundations, etc.
- **Campaign Refinement.** After delivery, refine the campaign plan considering input from key staff, Board members, and solicitation volunteers.

PROPOSAL FORMAT AND SCOPE

Respondents are required to furnish one digital copy of their 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 is required to address the following areas:

- 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, if different.

- Experience: Briefly describe three projects recently executed by the firm for relevant 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.
- Personnel: Provide professional resumes for the main people to be assigned. 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. Submit a statement on why you believe you are the best qualified to carry out the project.
- An itemized menu of services broken down by phase and cost.

Proposals must respond to the following 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. Length of time in business and number of capital campaign planning studies completed.
2. Capital campaign planning studies completed for public libraries, with a list of the libraries served.
3. Familiarity with the Library's demographics and any work completed with an organization exhibiting a similar demographic.
4. Time frame required for a campaign planning study to be completed.
5. Provide at least three references from non-profit or municipal clients.
6. Testing and support plan.
7. Discussion in your responses of how your campaign planning study would address the following:
 - 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 and who might oppose a campaign
 - Identification of leaders in the fundraising effort, both within the Library community and among other residents
 - Names of potential major donors/funders and what their interests might be
 - Identification of the amount of money that can be reasonably raised
 - In addition to determining how much money can be raised, other purposes the campaign study findings report can serve

- Other major fundraising campaigns that are launched that might compete for the same donors
- Possible alternatives for raising funds
- Role Trustees, staff, volunteers, and the Burlington Library Foundation have to take in the study and in a campaign
- Training required to fill leadership positions and committee selections
- Appropriate timeframe for both the campaign planning study and the fundraising itself

RFP RESPONSES

Responses to the RFP must be received by 10 a.m. on Friday, May 21, 2021, and should be sent to Library Director Joe Davies at director@burlingtonlibrary.org. Please include "Proposal for Fundraising Feasibility Study" as the subject of the email. Questions must be submitted in writing to Joe Davies at the above email address.

CONSULTANT SELECTION

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

- Demonstrated experience of individual(s) to be assigned to the campaign
- Firm's or individual's understanding of socioeconomic communities similar to the Library's demographic
- Strategy's fit with the Burlington Public Library's values and operations
- Proposal costs

Following proposal scoring, the top ranked firms or individuals, including the staff to be assigned to this campaign, will be expected to participate in an interview via telephone or video-conference. Upon selection of a finalist, Burlington Public Library will enter into contract negotiations. If these negotiations fail, Burlington Public Library will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified by June 30, 2021.

ADDITIONAL INFORMATION & CONDITIONS

In addition to all other rights granted to it under Wisconsin Law, the City of Burlington reserves the right to waive formalities in the proposal process; to accept or reject any or all proposals received as a result of this request; to request additional information concerning any proposal; to accept or negotiate modifications to any proposal; to negotiate with qualified attorneys; to interview any respondent; to cancel, in part or in its entirety, the request for proposals; or to waive any irregularities in any proposal following the proposal submission deadline date to

serve the best interests of the City. The City also reserves the right to negotiate separately with any respondent whatsoever, in any manner necessary to serve the best interests of the City. This request for proposals does not commit the City to pay any costs incurred in the preparation or evaluation of a proposal. All inquiries regarding this Request for Proposals should be directed by e-mail to Joe Davies, Library Director, at director@burlingtonlibrary.org