



**REQUEST FOR PROPOSAL
FUNDRAISING CONSULTANT SERVICES
Capital Campaign Plan**

The Crystal Lake Public Library Board of Trustees plan to engage in a capital campaign to raise funds to roughly double the size of the existing 40,000 square foot library building, located at 126 Paddock Street, Crystal Lake, IL. Based on a needs assessment, community input, and conceptual drawings developed by Engberg Anderson, an architectural firm, the anticipated amount of the entire project will be as much as \$28.6 million. The Library Board intends to raise needed funds through professional fundraising.

The Board of Library Trustees seeks the assistance of an organization or individual who has a proven track record in the ability to conduct capital campaign planning studies, as well as to develop and execute a campaign plan.

ORGANIZATIONAL BACKGROUND

Crystal Lake Public Library (CLPL) celebrates 100 years of service to the public in 2013. In 1999 and again in 2008 the Crystal Lake Public Library was ranked #10 among public libraries by Hennen's in the 25,000 – 49,000 population category. In 2011 the Library won the Crystal Lake Chamber of Commerce's PICA (Pride in Crystal Lake Award) for fiscal responsibility. All of the Library's awards have been related to service and financial stewardship.

The Library's Mission Statement is: Helping people, of all ages and backgrounds, learn, enjoy and better their lives, and is expressed by the Library tagline, Learn, Enjoy, Explore.

Over the years the Library's most significant challenge has been the need for space and an adequate facility. For the past twenty years, space needs studies have consistently indicated a need for more than double the current square footage in order to meet the service goals of the Library facility. The chart below reflects the years the Library has conducted Space Needs Studies and the related findings:

Year	Population	Current Sq Ft	Needed Sq Ft
1994	28,016	27,000	64,763
2004	38,000	40,000	88,021
2011	40,743	40,000	87,305

2004 Needs Assessment and Library Referendum

In response to a 2004 space needs study showing that the Library needed more than twice the amount of space, an advisory referendum to build a new Library at a new location was put on the ballot. The referendum was defeated. The Library Board formed a Citizens' Library Advisory Committee (CLAC) and conducted a public opinion survey to determine next steps. The results of the study indicated that the public wanted the Library to: "Stay where you are" and "Make do for now."

2007 Project Shoehorn – A Five-Year Solution

As a result of a Citizens' Library Advisory Committee recommendation and the public opinion survey, the Library began a reorganization project called "Project Shoehorn." Project Shoehorn was developed as a short-term, five-year solution to current space issues within the confines of the current building footprint. Project Shoehorn was completed in 2007.

2011 Needs Assessment and Resulting Priority

In 2011, the Library conducted an extensive Needs Assessment which involved input from more than 100 community members. In October of 2011, the Library Board engaged in a Strategic Planning Session and updated the Strategic Plan using the information from the 2011 Needs Assessment, as well as information gathered during visits to six library facilities over the summer of 2011. **The top priority emerging from that session was the need for an expanded, flexible Library facility to meet the service needs of our community now and for generations to come.**

2012 Exploring an Expanded, Flexible Library Facility

In early 2012, the Library Board hired Joe Huberty, Architect with Engberg Anderson, to explore building options at the Library's current site and to help with the application of an Illinois Public Library Construction Grant. The Library did not receive the grant.

The Library completed the conceptual design phase of the building initiative in April, 2012. The conceptual plan, designed by Engberg Anderson to maximize the use of the current site, shows a multilevel 87,000 sq ft building with an estimated cost of \$28.6. In July 2012, the Library Board hired Engberg Anderson to begin work on the Schematic Design stage of the building process.

PURPOSE AND SCOPE

CLPL is requesting submissions from fundraising consultants interested in managing a multiyear Capital Campaign to raise money needed to finance an expanded, flexible Library facility to meet the service needs of our community now and for generations to come.

The purpose of this Request for Proposal is to retain a Fundraising Consultant who will:

Phase 1 - Conduct a Campaign Planning Study (60-90 days)

- Assist in the development of a case study
- Work with Library Board to identify key prospects and communications groups
- Conduct interviews with key prospects
- Conduct interviews with key communications groups
- Determine realistic campaign goals

Phase 2 – Develop a Campaign Plan

- Develop a capital campaign plan and calendar maximizing the Public Relations value of the Library's 100th anniversary in November 2013
- Assist in developing collateral materials and use of social networking opportunities
- Train Board, volunteers (may include Library Foundation and Friends group) and staff
- Assist in development of a volunteer Campaign Group

Phase 3 – Execute/Manage the Campaign

- Manage campaign prospect identification and evaluation
- Assist in development of campaign materials
- Oversee prospect calls and follow-ups assisted by volunteers
- Promote donor stewardship and cultivation
- Work with 100 Year Anniversary Committee to identify potential campaign events
- Develop donor tracking and assist with donor recognition
- Work with Board PR/Planning Committee on the management of public information and public relations plan

SCHEDULE

CLPL would like to substantially conclude the campaign by April 30, 2015. The preliminary schedule for the campaign is:

Consultant Interviews	August 20, 2012
Consultant Selection	September 19, 2012
Campaign Planning Study	Through December 12, 2012
Campaign Plan	Through February 6, 2013
Campaign Launch	Beginning March 2013

PROPOSAL FORMAT AND REQUIREMENTS

Respondents must furnish one original and ten copies of their proposal. Please limit proposal to 20 pages (not including staff resumes). Estimated price and terms for services should be provided separately listing breakdown scope of services in a sealed envelope marked "Estimated Price & Terms for Services." Please address the following areas in your proposal:

- 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.
- 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.
- An itemized cost of your services by Phase

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 planning studies have you completed?
2. Have you completed a campaign planning study for a public library and if so, which one(s)?
3. How familiar are you or your firm with the Crystal Lake demographic? Describe any work you have done with an organization with a similar demographic in the past.
4. What is the success rate of projects/organizations for which you have done capital campaigns?
5. What time frame would be required for a campaign planning study to be completed?
6. Please provide at least three references from non profit or municipal clients.
7. Please provide any vendor relationships you are proposing as part of this proposal.
8. What is your testing and support plan?
9. Please discuss in your response 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
 - Who are the Library's allies and who might oppose a campaign?
 - Who might be leaders in the fundraising effort, both within the Library community and among other residents?
 - 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 campaign 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, Library Foundation 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 any and all costs associated with managing the capital campaign

CONSULTANT SELECTION

Proposals will be evaluated and scored by the CLPL Board of Library 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 socio-economic communities similar to Crystal Lake
- Campaign strategy's fit with CLPL's values and operations

The CLPL Board may or may not choose to conduct telephone, online or in person interviews. Following proposal scoring, the top ranked firms or individuals, including the staff to be assigned to this campaign, will be expected to travel to Crystal Lake at its/his/hers expense for an interview. Upon selection of a finalist, CLPL will enter into contract negotiations. If these negotiations fail, CLPL will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified.

RFP RESPONSES

Responses to the RFP must be received by noon on August 7, 2012 and should be directed to Crystal Lake Public Library, attn: Kathryn I. Martens Library Director, 126 Paddock Street, Crystal Lake, IL 60014. Please state "Proposal for Capital Campaign" on the outside of the response package and provide one original and 10 copies of the proposal. Questions can be addressed to Linda Price (815.526.5101) or lprice@crystallakelibrary.org.

ADDITIONAL INFORMATION & CONDITIONS

Statement of Non-Commitment

Issuance of this RFP does not commit the Crystal Lake Public Library to award a contract or to pay any costs incurred in preparation of proposals responding to the RFP. CLPL reserves the right to reject any or all proposals and re-advertise. All proposals become the property of the Crystal Lake Public Library.

EQUAL EMPLOYMENT OPPORTUNITY

Successful contract bidders must comply with provisions of all applicable federal law, Title VI and Title VII of the Civil Rights Act of 1964. Any subcontracting by the successful bidder subjects the subcontracting firm(s) to the same provisions of the federal law.