



REQUEST FOR PROPOSAL

Capital Campaign Consultant Services



360 East Deerpath Road
Lake Forest, IL 60045
847.234.0636
www.lakeforestlibrary.org

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Overview

Lake Forest Library is seeking submissions from fundraising consultants to provide professional services for a capital campaign assessment and potential capital campaign.

Contact Person: Catherine A. Lemmer, Director
clemmer@lakeforestlibrary.org
847.810.4602

Date of Issue: August 17, 2018

Due Date: Thursday, September 13, 2018, 5:00 pm (CT)

Submit to: Catherine Lemmer, Director
Lake Forest Library
360 East Deerpath Road
Lake Forest, IL 60045
clemmer@lakeforestlibrary.org

Board of Trustees: Ron Levitsky, President; Carrie Travers, Vice President; Wendy Darling, Treasurer; Elizabeth Parsons, Secretary; and Trustees Germaine Arnon, Elizabeth Grob, Andrea Lemke, Todd Puch, and David Rose.



360 East Deerpath Road, Lake Forest, Illinois 60045 • 847.234.0636 • www.lakeforestlibrary.org

General

1. The RFP and addenda are available on the Library's website at: www.lakeforestlibrary.org/requests.
2. Any changes to the RFP or addenda will be posted no later than Tuesday, September 11, 2018, by 5:00 pm (CT). Organizations are responsible for checking the Library's website to ensure that they have the most current RFP information.
3. All questions pertaining to the RFP must be in writing and received no later than 5:00 pm (CT), Monday, September 10, 2018. Send questions via email, using the subject line *Capital Campaign Services RFP*, to Catherine Lemmer at clemmer@lakeforestlibrary.org.
4. The Library is not liable for any costs incurred by any organization or agent thereof in connection with this RFP. Expenses incurred by responding organizations and its agents are the sole responsibility of the organization and may not be billed or charged to the Library now or at any time in the future.
5. Please submit twelve (12) printed copies to the Library address noted in the Overview (page 3), no later than 5:00 pm (CT), Thursday, September 13, 2018. See instructions regarding submission of estimated costs and fees for service in **Required Information – Fee Structure** (page 12).
6. All submitted proposals are binding until Wednesday, December 12, 2018 (ninety (90) calendar days following the submission due date).

RFP Purpose

The Library seeks proposals from fundraising consultants interested in working with the Library to (i) assess the philanthropic community's interest in supporting a capital campaign; and (ii) develop a capital campaign based on such assessment. The goal of the capital campaign is to address the library building's structural problems and redesign the library building to respond to emerging service demands and future needs of the community.

The Library Board, Director, and staff expect to collaborate actively with the selected firm in the work to ensure that the deliverables meet the Library's expectations and the needs of the community.

The Library

The Lake Forest Library was chartered on July 4, 1898. The Library moved from its original location on the second floor of City Hall to its current building and location in 1931.

In spring and summer of 2017, the Library completed a Community Needs Assessment and adopted its 2017–2019 Strategic Plan. As part of its new strategic plan, the Library adopted a new mission statement in September 2017:

Lake Forest Library: inspiring life-long learning, promoting the free and respectful exchange of ideas, and building community.

Over 95% of adults and 82% of teens completing the Library's 2017 Community Needs Assessment Survey agreed or strongly agreed that the Library is relevant to the Lake Forest community. Over 70% of Lake Forest residents have library cards.

The Library's 2017–2019 Strategic Plan is at: www.lakeforestlibrary.org/plan. The Executive Summary of the Community Needs Assessment is at: www.lakeforestlibrary.org/needs-assessment.

The current director joined the Library in May 2016 when the previous director of 28 years retired. The Library is governed by a nine-member Board of Trustees selected by the Caucus and appointed by the Mayor with approval of the City Council. Trustees serve a maximum of two three-year terms.

The Library is a member of CCS, a 24-library consortium.

The Friends of Lake Forest Library, a 501(c) foundation, support the work of the Library through book sales.

The annual operating budget for FY2019 is \$4.2 million; with capital improvement reserve funds of \$1,450,000. The Library's FY19 revenues include a \$62,000 gift for programming from the Friends of Lake Forest Library. The Library's fiscal year is May 1 to April 30.

In FY2018, \$3,985,503 (93%) of the Library's operating budget came from property taxes; \$157,217 (3%) from miscellaneous revenues; and \$167,773 (4%) from gifts and contributions, including one bequest of \$148,000. In FY2018, the Friends made a gift to the Library of \$94,600 in support of programming and development of a new website.

In February 2018, the Library launched a new website and adopted a new logo.

In March 2018, the Library retained the services of HGA Inc., an architectural and engineering firm, to prepare a feasibility study to address the current and future needs of the Library's building and grounds. The feasibility study presented the Library Board of Trustees with multiple options.

The Library Building

The Library was chartered on July 4, 1898 and moved to its current location in 1931.

The present Library building, designed by architect Edwin H. Clark (who also designed the Brookfield Zoo and the Village Hall in Winnetka, Illinois), was dedicated on June 7, 1931. The building was designed and built as a Library and given as a gift to the City of Lake Forest by Mrs. Charles H. Schweppe and Mrs. Stanley Keith in memory of Mrs. Keith's first husband, Kersey Coates Reed. Then library president, Alfred E. Hamill, a wealthy book collector, poet, investment banker, and friend of David Adler (designer of Hamill's Centaurs estate), oversaw the building and siting of the Library.

Designed in the *Grecian Moderne* style popular in the 1920s and 1930s, the Library is located in a National Register of Historic Places District. The building follows a classic symmetrical plan around a central domed rotunda, similar to the 1929 Shedd Aquarium in Chicago, Illinois. The building, its landscape, and its art are an excellent example of the Chicago Renaissance, the period from the 1893 World's Columbian Exposition to the start of World War II.

The rotunda houses the Kersey Coates Reed memorial stone relief of *The Archer* by Oskar J. W. Hansen (1892–1971) and the extraordinary Nicolai Remisoff (1887–1975) murals. The archer's face is a likeness of Mr. Reed. The inscription reads: "In memory of Kersey Coates Reed, eighteen hundred and eighty—nineteen hundred and twenty-nine—who was much loved in Lake Forest—where he lived—and who cared greatly for good books—this building has been erected." The twelve murals painted by Remisoff depict the great authors of antiquity.

The high-ceilinged, wood-paneled rooms on the building's main level contribute to its warm and inviting atmosphere. The fireplace in the quiet wood paneled Friends Reading Room is lit from November to April.

In 1978, three new wings were completed and dedicated. The architects were Brenner, Danforth, and Rockwell. Funds for the \$1.1 million addition were underwritten by gifts from the community and a substantial donation from the Reed family.

In 1984, the leaded copper dome was replaced. A second replacement is now required.

In 1991, the three-level stack area was renovated (glass floors removed, skylight added, and stacks opened to the public) and the first floor restrooms and circulation office were added.

In 1992, the Library refurbished the Children's Library in the lower level. The Friends of Lake Forest Library commissioned a mural by Thomas Melvin for the Children's foyer.

In 1996, renovations and refurbishing were completed in the Adult Reference Room and the Friends Reading Room. The Deer Path Art League of Lake Forest commissioned a Michael

Croydon sculpture entitled *Ex Libris*, which was installed on the Library front lawn. The Friends of Lake Forest Library funded the cleaning and restoration of the 1931 Nicolai Remisoff murals.

In 2000, the Children's Library courtyard was covered, enclosed, and renamed the Louise Wells Kasian Children's Activity Center. Furnishings were funded by the Friends of Lake Forest Library. The room, currently known as the Kasian Room, hosts many programs for both children and adults.

In 2009, Children's Library was completely renovated.

In 2011, the Library installed a DVD media bank (DVD2GO) on the west side of Lake Forest at an approximate cost of \$49,000.

In 2012–2014, slate roof, flat roof, and gutter work were completed at an approximate cost of \$345,000.

In 2013, the Library undertook a \$210,000 window restoration project with funds from private donors and the Friends of Lake Forest Library.

In 2014, the Library, with funds from private donors and the Friends of Lake Forest Library, added a media lab that is popular with Lake Forest residents. Total project cost was approximately \$240,000.

In 2017, the Library Director's office on the main floor became an adult services program room.

In addition to the DVD2GO, the Library maintains a materials return on the west side of Lake Forest.

Including the Hansen stone relief (*The Archer*) and the twelve murals by Remisoff, the Library owns and stewards an extensive and valuable art collection. Ten first edition original prints by John James Audubon line the paneled walls of the Friends Reading Room; other first floor art includes watercolors by local artists Franklin and Mark McMahon as well as a set of Joseph Pennell lithographs representing classical sites. The Children's Library and the Library grounds include murals and sculptures in bronze, marble, and wood.

A history of the Library and its art collection is at: www.lakeforestlibrary.org/mission-and-history.

Scope of the Project

The Library seeks proposals from fundraising consultants interested in working with the Library to (i) assess the philanthropic community's interest in supporting a capital campaign; and (ii) develop a capital campaign based on such assessment. The goal of the capital campaign is to address the library building's structural problems and redesign the library building to respond to emerging service demands and the future needs of the community. HGA, Inc. presented the Library Board of Trustees with multiple options, all of which will require significant capital investment. At this time, the Board is not prepared to make public the estimated costs provided by HGA, Inc.

We anticipate a three-phase project:

Phase 1 – Assessment of the Philanthropic Community's Interest

- Conduct confidential interviews with library leadership, trustees, and others
- Identify and evaluate resources available to support a capital campaign
- Identify challenges to a successful capital campaign
- Identify potential prospects
- Complete an audit to assess internal capabilities to support a campaign
- Present findings to library leadership and trustees

Phase 2 – Audit of the Philanthropic Community's Interest

- Develop the Library's case statement and story
- Conduct confidential interviews with potential prospects
- Determine realistic campaign goals
- Present recommendations to library leadership and trustees

Phase 3 – Develop a campaign plan

- Develop campaign plan, including specific goals for dollars raised, milestones, solicitation strategies
- Develop a campaign calendar
- Develop a campaign budget
- Assist in the development of the campaign materials
- Present recommendations to library leadership and trustees

Proposed Schedule

The Library would like to move quickly in the selection of campaign counsel and implementation of Phase 1. The selected firm should be prepared to begin work immediately after a contract is signed with the goal of completing work on the following preliminary schedule:

October 1, 2018 Consultant Selection

February 1, 2019 Completion of Phase 1

June 1, 2019 Completion of Phase 2

September 1, 2019 Completion of Phase 3

Evaluation Process and Criteria

The RFP will be published and notice of its release sent to a select number of firms with relevant experience. The RFP and any addenda will also be available on the Library website at: www.lakeforestlibrary.org/requests. The Library will select the firm based on its professed ability to meet the overall expectations of the Library. The Board of Trustees will be the judge of which submission offers the greatest benefit to the Library. The following criteria will be used in the selection process:

- Responsiveness and completeness of the response provided to the RFP.
- Experience and qualifications of consultant and management team, including demonstrated knowledge of planning, management, evaluation skills, and experience.
- Technical quality and methodology of consultant's approach to organizing and managing the project; ability to document information and recommendations clearly in written format.
- Understanding of project objectives and scope; responsiveness to the goals outlined in the Library's 2017–2019 Strategic Plan, available at: www.lakeforestlibrary.org/plan.
- Ability of the consultant and management team to communicate and build consensus with board members, staff, and community residents.
- Ability of the consultant and management team to communicate with various governmental units, including Lake Forest Plan Commission, Lake Forest Historic Preservation Commission, Lake Forest City Council, Lake Forest Preservation Foundation, and others.
- Experience with public library fundraising projects and/or public building campaign projects.
- Experience with projects requiring historic sensitivity.
- Past and current projects.
- References and examples of completed consulting projects. Satisfaction of former clients with competency of completed work.
- Overall project management and ability to accomplish a project of this nature within the proposed time schedule.

Selection Process

The Library's Board of Trustees and Library Director will review and evaluate the written responses to the RFP. The Board and Library Director, at their discretion, may seek expert advice in reviewing the responses. Firms submitting the top-ranked proposals may be invited to participate in an on-site interview at their own expense during the week of September 17-22. Full details regarding the interview schedule and format will be announced later in the process.

The Library's Board of Trustees and Library Director will evaluate, select organizations for interviews, check references, make the final decision, and enter into contract negotiations with the successful organization. If these negotiations fail, the Library will proceed with contract negotiations with the firm scoring second, and so on. Unsuccessful respondents will be notified as soon as possible.

The Library is under no obligation to make a selection under this RFP, and it reserves the right to make any selection it chooses. The Library reserves the right to reject any and all submissions at its sole discretion, accept a proposal based on considerations other than cost, and waive or modify any provision of this RFP.

Submissions

Submit twelve (12) printed copies no later than 5:00 pm (CT), Thursday, September 13, 2018, to:

Catherine Lemmer, Director
Lake Forest Library
360 East Deerpath Road
Lake Forest, IL 60045

See instructions regarding submission of estimated costs and fees for services in **Required Information – Fee Structure** (page 12).

Late submissions will not be accepted. Proposals will not be opened in public, and proposal information will be kept confidential until an award is made. An acknowledgement will be sent for each proposal received.

The response must include the below listed required information in the stated order. Submissions should not exceed 20 single-spaced pages. This limit does not include the cover letter and resumes. The submission may be printed single-sided or double-sided as long it does not exceed the 20 single-spaced page limit.

Required information

The following should be included in the submission in the stated order:

Introduction

1. Cover letter with firm's name, address, email, phone, and fax number.
2. Contact person's name, address, email, phone, and fax number.
3. Statement of philosophy.
4. A concise statement that demonstrates the organization's understanding of the project and scope of services sought by the Library.
5. Description of the organization's approach to the project.
6. Description of the implementation of the project, include listing of specific tasks.
7. Proposed completion date and timeline for the project.
8. Description of any additional consultants that will perform work as part of your proposal. Provide names, addresses, and relevant experience for additional consultants.

Organization History/Experience

1. Number of years in business.
2. Type of organization.
3. Type of ownership, identify owners, partners, etc.
4. Geographical areas of operation.
5. Professional affiliations.

Personnel

1. List of principals and stakeholders.
2. Description of the size and composition of your organization.
3. An organizational chart.
4. Resumes of the proposed project manager and other key personnel proposed to be assigned to this project (the "team").

Experience and References

1. Discuss your organization's experience and, in particular, the team's experience with capital campaigns for public facilities and, in particular, public libraries.
2. Identify five completed similar projects, that the identified key personnel have completed within the last five (5) years which best represent the skills of the organization and the team. For these projects provide:
 - a. Name and address of client.
 - b. Name, telephone number, and email address of the client contact person.
 - c. Summary of the project, including year completed.

Other Information

Provide other pertinent information that you feel makes you qualified for the proposed project.

Fee Structure (Note Special Delivery Instructions)

1. Provide information on your proposed fee structure which separately lists each service and related fee based on the scope of the project discussed above, separately stating, if necessary, any charges for anticipated reimbursable costs. This structure should be expressed as a “fee not to exceed” figure which itemizes all services included in the proposed fee, as well as an itemized list of what would be considered “additional services” if requested by the Library.

The fee structure information should be provided separately in a sealed envelope marked “Estimated Price and Terms of Service.”

Anticipated Timeline

| Item | Due Date |
|---|-----------------------|
| Issue RFP | August 17, 2018 |
| Written submissions due | September 13, 2018 |
| Interviews with Board and Library Director | September 17-22, 2018 |
| Selection and notification | September 24, 2018 |
| Complete negotiation and approval of contract | October 1, 2018 |