



Request for Proposal

Friends of Lakeshore State Park



Capital Campaign Fundraising Consultant for
The Visitor and Education Center at Lakeshore State Park

Release Date: February 8th, 2021
Submission Due Date: March 19th, 2021



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Introduction

The Friends of Lakeshore State Park (FLSP or *Friends*) seek a fundraising consultant for this signature opportunity to plan and manage a capital campaign to raise \$7 million to fund the construction of and endowment for a Visitor and Education Center at Lakeshore State Park. The campaign will be conducted in close consultation and with the active support of the Friends of Lakeshore State Park’s Capital Campaign Committee. The project consists of the main building, a modern, net-zero energy year-round structure, and an outdoor plaza with fireplace to accommodate up to 300 visitors, solar energy panels over the plaza, outdoor stone terrace, stormwater green infrastructure, wetlands, native agriculture gardens and a storage shed.

When completed, the building will be the last of four architecturally significant projects on Milwaukee’s downtown lakefront, with the first being the Milwaukee County War Memorial designed by Eero Saarinen and constructed in 1955, the second being the world famous Milwaukee Art Museum expansion designed by Santiago Calatrava and completed in 2001, and the third being the Discovery World Science and Technology Museum designed by Jim Shields and completed in 2006. The building will be designed to last 100 years and is an extraordinary design by local architecture firm The Kubala Washatko Architects. The site is one of the most photographed in the Milwaukee area. It is possible that there will be no project completed in Milwaukee in the next several decades that will have the visual prominence and national recognition of the Lakeshore State Park Visitor and Education Center. For donor recognition, this is the signature opportunity in Milwaukee of the current decade.

Location of Project

In the heart of downtown Milwaukee along Lake Michigan, in one of the city’s most unique and premier locations, Lakeshore State Park is adjacent to the Henry W. Maier Festival Grounds and Discovery World at Pier Wisconsin. The park is an urban oasis offering a small beach and accessible paved trails that link Milwaukee’s other lakefront parks and the Hank Aaron State Trail. With more than 415,000 visitors in 2020 alone, Lakeshore State Park has distinguished itself as an exceptionally accessible and attractive destination for education, recreation, social



gathering and communing with nature. The Visitor and Education Center will be located next to the marina at the northern edge of the park and the storage shed will be constructed at the southern entrance to the park in the shadows of the Daniel Hoan Memorial Bridge.

Background

The Friends of Lakeshore State Park partner with the Wisconsin Department of Natural Resources and our community to support Lakeshore State Park as Milwaukee’s premier urban lakefront destination for environmental and freshwater education, conservation, recreation and outdoor enjoyment. The Friends of Lakeshore State Park is a non-profit organization chartered as a 501c(3) dedicated to supporting Lakeshore State Park and its partners. The Friends raise funds for and participate in educational programming, events, infrastructure, and marketing and build memberships and strategic alliances to succeed in these efforts.

For the past several years, FLSP has been laying the groundwork for the Capital Campaign for the Visitor and Education Center at Lakeshore State Park. In close coordination with state and local officials, including the Department of Natural Resources (DNR) and other supporters of Lakeshore State Park, members of the FLSP Board of Directors have obtained the support of key stakeholders, conducted substantial project research and engaged in considerable consultation with fundraising professionals and potential donors. All materials produced by the FLSP Board of Directors, including updated donor mapping reports and the project’s case for support, will be provided to the winning bidder to support the Capital Campaign.

Visit the FLSP website (<https://friendslsp.org/>) and consult the Appendices for additional background information.

Scope of Work

- Direct the campaign and execute the strategy to achieve a successful outcome.
- Offer creative ideas and strategies to position the Friends of Lakeshore State Park for the campaign, attract community leaders, cultivate individual and institutional donors and secure the campaign’s goals.
- Develop and monitor an implementation plan with clear benchmarks and metrics for progress throughout the campaign period.
- Assist in recruiting and educating Capital Campaign Committee members.
- Provide guidance, materials and direct support to Capital Campaign Committee members and others that support donor solicitation and outreach.



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- Assist in the process of developing, maintaining and tracking a list of potential major gift donors at the local, state and national levels. Continually revisit, revise and add to this list of donor prospects throughout the campaign.
- Coordinate with the FLSP administrator tasked to manage and maintain a database to track donor outreach, pledges and contributions; maintain communication with donors, including payment reminders and pledge agreements.
- Work with the Capital Campaign Committee to develop approach strategies and customized presentation materials for major donor prospects.
- Collaborate with Capital Campaign Committee to develop campaign-related communications, specifically materials for solicitation including print, web and social media platforms.
- Coordinate with the FLSP Grants Committee to ensure alignment with the Capital Campaign and to develop and submit proposals for prospective individual and institutional donors; be available to support the preparation and submission of reports to donor institutions and individuals.
- Work with the Capital Campaign Committee to identify and secure appropriate recognition and acknowledgement for major donors.
- Prepare, review and edit campaign correspondence, updates and progress reports as appropriate.
- Manage capital campaign budget tracking, reporting both expenditures and contributed revenue.
- Assist in preparing agendas and materials related to campaign meetings and full Board meetings.
- Attend all campaign functions and meetings.
- Provide regular updates and progress reports to the campaign leadership; promptly communicate any major developments or challenges encountered.

Tentative Schedule

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| ▪ February 8 th , 2021 | RFP released |
| ▪ February 22 nd , 2021 | Questions due to Friends of Lakeshore State Park |
| ▪ February 29 th , 2021 | Answers provided to all applicants; open posting of all questions and answers |
| ▪ March 19 th , 2021 | Proposals due (<i>electronic receipt or postmarked by</i>) |
| ▪ March-April 2021 | Proposal review, interviews and selection |
| ▪ April-May 2021 | Selected applicants to present to Friends of Lakeshore State Park Board of Directors |
| ▪ May 31 st , 2021 | Final approval of selection |
| ▪ June 2021 | Execution of contract |



General Requirements

- The Friends of Lakeshore State Park will not be responsible for any costs incurred by potential applicants in their response to this RFP. All Statements of Qualifications and Proposals shall be retained by the Friends of Lakeshore State Park and will not be returned to bidders.
- It is the bidder's responsibility to comply with all instructions, terms and conditions to assure consideration of its proposal.
- Statements of Qualifications and Proposals submitted after the deadline will not be considered. All documents must be submitted at the same time and may be withdrawn at any time prior to opening.
- This RFP may be amended by the Friends of Lakeshore State Park in response to a need for further clarification and/or if additional requirements are identified. Any amendments to the RFP will be publicly posted and disseminated to those firms or individuals who have submitted questions or otherwise registered their intention to submit a Statement of Qualifications and Proposal.
- The Statement of Qualifications submitted shall represent the best efforts of the bidders and will be evaluated as such. Proposals must set forth full, accurate and complete information. Inaccurate or incomplete information shall be considered grounds for disqualification. Additional information beyond that which has been specifically requested is not desired.
- The contents of the proposal of the selected firm or individual will become contractual obligations when a contract is issued and signed, except for any elements that are specifically rejected by the Friends of Lakeshore State Park.
- The Friends of Lakeshore State Park expect that work shall commence as soon as practically possible upon signature of the contractual agreement.
- The Friends of Lakeshore State Park reserves the right to reject any or all proposals and to make any award that it determines to be in the best interest of Friends of Lakeshore State Park.

Statement of Qualifications and Proposal Content

All submitted responses to this RFP by prospective bidders shall contain clearly identified Statement of Qualifications section and a Proposal section as described below.

The Statement of Qualifications shall contain detailed descriptions and references pertaining to the following:



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- A. Name and business address of the bidder and identification of the bidder as a corporation, joint venture, partnership (including type of partnership) or individual. If the bidder is a partnership or joint venture, bidder shall provide names of general partners or members of the joint venture.
- B. Name, title, telephone number(s), address and email address of the person authorized to serve as the contact person on behalf of the bidder.
- C. Complete descriptions of three (3) recent projects by the bidder. The Friends of Lakeshore State Park prefer to receive past project descriptions that are similar in nature, size and scope to the proposed Visitor and Education Center at Lakeshore State Park. Bidders shall also submit a listing of all capital campaign projects that they have managed or supported in the past five (5) years, specifying those for which the bidder was the lead manager and those for which they contributed to in a supporting role.
- D. Describe your past experience working with all-volunteer, grassroots organizations like FLSP.
- E. Bidders shall submit the name(s), qualifications and recent relevant experience of the key personnel to be assigned to this campaign, including those of the lead manager. By proposing specific individuals, bidder agrees to make those individuals available for the duration of the project, unless the Friends of Lakeshore State Park agrees to a change in personnel.

The Proposal shall contain the following:

- A. **Narrative** – provide a 4-6 page description of how the bidder proposes to execute the Scope of Work, including a breakdown of key tasks and activities and a timeline for completion of the Capital Campaign. The narrative should demonstrate how the bidder will apply its unique expertise and knowledge of the Greater Milwaukee philanthropic sector to achieve the objectives of this specific project. Identify any challenges or obstacles that you observe with the proposed project and lay out your approach to addressing these issues.
- B. **Budget** – provide a descriptive budget summary for the Capital Campaign that results in the achievement of the \$7 million goal. Specify the proposed duration for completion of the Capital Campaign. Bidders may use their own budget format and cost categories, but the cost proposal should be broken down by month, clearly state hourly billing rates and identify the estimated reimbursable expenses. The budget should include a breakdown of costs by proposed key tasks and activities.



Evaluation of Statement of Qualifications and Proposal

The Friends of Lakeshore State Park reserves the right to reject any or all proposals and to make any award that it determines to be in the best interest of Friends of Lakeshore State Park. The Friends of Lakeshore State Park shall not base its decision solely on cost but shall consider cost in conjunction with the following additional criteria: 1.) relevant experience and past performance of the bidder on similar capital campaigns, 2.) key project personnel, 3.) project understanding and approach as detailed in the Proposal, 4.) availability and proposed project schedule, 5.) references from past clients and 6.) overall responsiveness and compliance with RFP requirements.

Based on the evaluation of all complete bids, the Friends of Lakeshore State Park may select up to three (3) bidders to present proposals, including cost breakdown, as part of an interview process with select members of the Board of Directors. Upon conclusion of that interview process, the Friends of Lakeshore State Park will select a Capital Campaign Fundraising Consultant and initiate contract negotiations.

The Friends of Lakeshore State Park will seek to conclude contract negotiations in a timely manner. If, during the course of contract negotiations, it becomes apparent that the parties cannot successfully reach an agreement, the Friends of Lakeshore State Park reserve the right to break off negotiations and initiate negotiations with another bidder.

Submission Timeframe and Information

- A. Proposal documents should be submitted electronically as PDF files to (admin@friendslsp.org), with Cc: to susan.frautschi@gmail.com and (williamschmitt@gmail.com)
 - a. Questions from potential bidders can also be sent to the above email addresses
- B. If proposal documents are too large to be transmitted via email, a full set of proposal documents may be submitted via flash drive (preferred) or hard copy and delivered to:
 - a. Friends of Lakeshore State Park
500 N. Harbor Drive
Milwaukee, WI 53202
 - b. Due to COVID-19 protocols, please coordinate a delivery date/time for hard copy delivery with the above-mentioned email addresses
- C. The deadline for submission of complete bids is 5:00 p.m. on March 12th, 2021
- D. All submissions received by the deadline will be opened at the same time by the Friends of Lakeshore State Park, with detailed notes and recording of the key details of each submission. No submissions will be opened or reviewed prior to this meeting.



Appendices

- Appendix A: FLSP Visitor and Education Center brochure
- Appendix B: FLSP Visitor and Education Center PowerPoint presentation
- Appendix C: Visitor and Education Center preliminary building and site design prepared by Kubala Washatko