



CITY OF GREENFIELD, a/k/a TOWN OF GREENFIELD
GREENFIELD, MASSACHUSETTS

RFS TITLE: Fundraising Consultant Services

RFS #: 15-04

DATE OF ISSUANCE: Monday, November 10, 2014 at 10:00 a.m.

RESPONSE DATE: Monday, November 24, 2014 at 2:00 p.m.

SUBMIT TO: PURCHASING DEPARTMENT
TOWN OF GREENFIELD
14 COURT SQUARE
GREENFIELD, MA 01301

Sealed proposals addressed to the Procurement Office, 14 Court Square, Greenfield, MA 01301 and endorsed "Proposal for Contract 15-04 Library Fundraising Consultant Services" will accepted by the Mayor's Office in Town Hall on behalf of the Greenfield Public Library.

A complete copy of the documents and specifications may be received electronically as of 11/10/14 after 10 a.m. by contacting the Purchasing Department of the Town of Greenfield at purchasing@greenfield-ma.gov or by calling 413-772-1560 x-136.

Contract/Proposal Awarding Authority: Town of Greenfield
Greenfield, Massachusetts

ADVERTISEMENT FOR BIDDERS

**Town of Greenfield Procurement Office
14 Court Square
Greenfield, MA 01301**

**Request for Services (RFS)
Town of Greenfield**

Fundraising Consultant Services

The Town of Greenfield through its Procurement Office is seeking an experienced fundraising consultant to manage a one-year project to determine the readiness of the Greenfield Public Library to conduct a Capital Campaign. Private donations will contribute to the funding of an improved library building.

The Massachusetts Board of Library Commissioners awarded the library a Planning & Design Grant in June 2014. The 2-year grant project will include a reexamination of both previous studies, an exploration of the relative merits of renovating versus building new, a recommendation of the most appropriate site for the library, and a plan for moving forward.

As of 10:00 a.m. on Monday, November 10, 2014 copies of this RFS 15-04 for “Greenfield Fundraising Consultant Services” may be obtained from the Town of Greenfield website at www.Greenfield-ma.gov under “Departments”, “Purchasing”, “Active Bids/RFQ/RFS” or electronically by contacting the Purchasing Department of the Town of Greenfield at purchasing@greenfield-ma.gov or by calling A. LaBonté at (413) 772-1560 x-136 for additional information.

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The Town of Greenfield is located in Western Massachusetts just south of the Vermont border at the intersection of Rte. 2 and Interstate 91. Settled in 1686, it was incorporated in 1753 and serves as the county seat of Franklin County. It has a population of approximately 17,550 people according to the 2012 US Census. Greenfield is a growing city, having been chosen for tens of millions of dollars in new private and public investment.

The Greenfield Public Library currently resides in the historic Leavitt-Hovey House, a wooden structure built in 1797, with east and west wings added in 1817. A masonry addition was constructed in 1908 when the building became the town's public library. A bookmobile garage was added in 1952. There have been accessibility, HVAC, electrical, and plumbing upgrades as well as routine repairs, but no significant additions or expansions since 1952.

A 1995 study by the Preservation Partnership of New Bedford, Mass., produced documents which provide an interesting discussion starter about the possibility of remodeling the existing structure. In 1996, Margo Jones Architects, of Greenfield, Mass., also studied the feasibility of expanding the library at its current location. Their conclusion: "Another building, at a different location, would be more suitable for municipal use as a library." While the two studies disagree on their final recommendation, one thing is clear: Greenfield needs a 21st century library.

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REQUEST FOR FUNDRAISING CONSULTANT SERVICES (RFS)

1. Introduction

The Town of Greenfield, Massachusetts, (“Owner”), acting through the its Purchasing Department is seeking the services of a qualified fundraising consultant to manage a one-year project to determine the readiness of the Greenfield Public Library to conduct a Capital Campaign. Private donations will contribute to the funding of an improved library building.

Contrary to many municipalities in the Commonwealth, Greenfield is a growing city, having been chosen for tens of millions of dollars in new private and public investment. The Bank Row Urban Renewal Zone has turned historic downtown buildings into new storefronts and loft apartments. New infrastructure includes a regional transit center with proposed Amtrak service along the Burlington-New York-Washington corridor as soon as 2015 and a new \$60M Franklin County Courthouse expected to be completed by 2017.

2. History, Profile, and Organizational Structure of the Town

The Town of Greenfield is located in Western Massachusetts just south of the Vermont border at the intersection of Rte. 2 and Interstate 91. Settled in 1686, it was incorporated in 1753 and serves as the county seat of Franklin County. It has a population of approximately 17,550 people according to the 2012 US Census.

The Town is governed under a home-rule charter, which vested executive Owner and responsibility in an elected Mayor, who serves a three-year term. Legislative Owner is vested in a 13-member Council of which nine members are elected from the Town’s nine precincts and four are elected at large. Members of the Council are elected every three years. A seven member School Committee is elected every three years and appoints the Superintendent of Schools, who has responsibility for the daily administration of the Greenfield Public Schools (K-12). The Mayor is also a member of the School Committee.

3. Library Background

The Greenfield Public Library currently resides in the historic Leavitt-Hovey House, a wooden structure built in 1797, with east and west wings added in 1817. A masonry addition was constructed in 1908 when the building became the town’s public library. A bookmobile garage was added in 1952. There have been accessibility, HVAC, electrical, and plumbing upgrades as well as routine repairs, but no significant additions or expansions since 1952.

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The Massachusetts Board of Library Commissioners awarded the library a Planning & Design Grant in June 2014. The 2-year grant project will include a reexamination of both previous studies, an exploration of the relative merits of renovating versus building new, a recommendation of the most appropriate site for the library, and a plan for moving forward.

4. Scope of Consultant Services

The fundraising consultant shall provide the following services:

- Develop and refine a fundraising plan based on key benchmarks
- Identify and approach select public officials and private sector community leaders for participation and support
- Assist and advise on site review and selection process
- Assist in the promotion of an alternate use plan for the existing site if relocation is the chosen option
- Conduct research on potential major donors
- Conduct research on potential tax credit eligibility
- Identify and implement a fundraising and financing infrastructure capable of executing a major capital campaign and holding the new library's real estate for tax credit acquisition purposes
- Develop an early Case for Support and other related materials

5. Fees

All charges for services requested should be identified along with an explanation of how the fees are calculated and a brief justification. The fees should include reimbursement expenses such as transportation, lodging, meals, office supplies, printing, special products, etc.

6. Contract Term and Renewal

The intended implementation date for these services is January 5, 2015. The project will run from January 5, 2015 to December 31, 2015.

The Town of Greenfield will have the option to renew this contract for Capital Campaign management services but is not obligated to do so.

7. Significant dates

RFS issued	November 10, 2014
Last Day to submit questions	November 17, 2014
Proposals due	November 24, 2014
Final candidates selected	December 1, 2014
Presentations to the GPL Trustees	December 8, 2014
Selection made	December 10, 2014

8. Submission Requirements

Each proposal must contain all of the information and supporting documentation described below:

1. Background of firm / individual
 - a. Provide name, address, phone, email and date established.
 - b. List experience with similar projects – include type of organization, size of community, scope of project, etc.
2. Administration, Organizations, Pricing, and Staffing
 - a. Explain your interest in this project.
 - b. Describe how you will implement this project. What distinguishes your approach from that of others?
 - c. Provide a proposed implementation schedule.
 - d. Detail your role and responsibilities during this project.
 - e. Explain your expectations of the library's Board of Trustees and staff during this project.
 - f. List any other services you offer that may be considered an added value to the library.
3. Track Record and References
 - a. Provide a client list within the past 5 years.
 - b. List experience working with government agencies, specifically public libraries.
 - c. Provide documentation of your success in achieving the fundraising goals of the organizations you represented.
 - d. Attest that you will be able to complete this project in the one-year time frame proposed. Describe your success in completing campaign readiness work within the recommended time frame.
 - e. Provide 3 client references. Include name, title, organization, phone number, and email address.
 - f. Provide samples of previous capital campaign readiness work.
4. Fee Schedule
 - a. Identify all charges for the services requested. Include reimbursement expenses such as transportation, lodging, meals, office supplies, printing, special products, etc. and provide a brief justification for each line item.
 - b. Explain how your fees are calculated.
5. Executed copies of each of the following documents in the form attached as (a) Conflict of Interest Statement , (b) Certificate of Non-Collusion (c) Certificate of State Tax Compliance
6. Four (4) copies of the proposal should be submitted in one envelope clearly marked "RFS 15-04 Fundraising Consultant Services Proposal" and four (4) copies of the pricing proposal in a separate envelope clearly marked "RFS 15-04 Fundraising Consultant Services – Pricing".

9. Selection Procedures

Each proposal will be reviewed by the Owner to determine if it is complete prior to actual evaluation. The Owner reserves the right, but shall have no obligation, to eliminate from further consideration any proposal deemed to be substantially or materially non-responsive to the RFS. The Owner will review all proposals and may select one or more responding firms for personal interviews.

The selection of the finalists will be based on the following criteria which reflect the Town's objective to contract with a reliable and experienced fundraising consultant, as applied by the Owner in its sole and absolute discretion. An applicant will be deemed unacceptable if their proposal is deemed non-responsive or if the minimum evaluation criteria are not met. However, once it has been determined that the proposal is responsive and the applicant has met all the minimum evaluation criteria, the proposals will be further evaluated by the Town of Greenfield using the following comparative evaluation criteria. The applicant with the highest comparative rating will be selected. The Town will select the most advantageous overall proposal, which need not necessarily be the lowest cost proposal. Comparative criteria will be rated pursuant to the following categories: Highly Advantageous, Advantageous, Not Advantageous, and Unacceptable.

1. How many Capital Campaign readiness studies has the firm conducted for the construction of public libraries and / or other non-profit construction projects?
 - a. Highly advantageous 5 or more campaigns
 - b. Advantageous At least 3 but less than 5
 - c. Not Advantageous At least 1 but less than 3
 - d. Unacceptable None

2. How many government organizations including public libraries does your firm currently represent? List the names of the organizations along with contact information for a representative of the organization.
 - a. Highly advantageous More than 25 organizations
 - b. Advantageous Between 10 and 24 organizations
 - c. Not Advantageous Between 5 and 9 organizations
 - d. Unacceptable Less than 5 organizations

3. What is your success in achieving the fundraising goals of the organizations you have represented? Provide documentation.
 - a. Highly advantageous 2 or more organizations 100% of goal
 - b. Advantageous Documentation of greater than 70% of goal
 - c. Not Advantageous Documentation of less than 70% of goal
 - d. Unacceptable No documentation

4. The Library Board of Trustees expects that this project will be completed within 12 months. What is your success in completing the campaign readiness studies from Item #1 within the desired time frame?
 - a. Highly advantageous 100 % of campaigns completed on time
 - b. Advantageous At least 75% of campaigns completed on time.
 - c. Not Advantageous At least 50% of campaigns completed on time
 - d. Unacceptable No campaigns completed on time

11. Additional Information

Questions regarding the RFS must be submitted in writing. They may be sent electronically via e-mail and directed to Lane Kelly at laneke@greenfield-ma.gov. In the subject line of the e-mail put "Question- Fundraising Consultant Services". Alternatively, they may be faxed to 413-772-1519 Attn: L. Kelly. Failure to provide the correct information in the email will deem the question unanswerable, and it will not be considered as part of any addenda.

The deadline for receipt of written questions is **5:00 p.m. on November 17, 2014**. The Owner will respond to all written questions which in the Owner's sole judgment may have a material effect on the RFS by posting written responses on its website, www.greenfield-ma.gov, not later than **5:00pm on November 20, 2014**.

12. Other Provisions

The Owner reserves the right to modify this RFS, in whole or in part, prior to the date fixed for submission of the Proposals, by issuance of an addendum or addenda, which shall be posted on the Owner's website. The Owner may extend the deadline for submission of Proposals if, in the Owner's judgment, such extension is necessary for any reason. It is the responsibility of each responding firm desiring to submit a proposal to obtain the Request for Proposals and any and all addenda that may be issued in connection with this RFS.

All expenses and costs, including but not limited to legal costs, associated with developing or submitting a proposal in response to this RFS, or associated with oral or written clarification thereof, including all presentation materials and related costs and travel expenses, shall be borne solely by the responding firm, and under no circumstances shall the Owner be responsible for any such cost or expense incurred by any responding firm. The Owner assumes no responsibility for these costs and expenses.

Responding firms may withdraw their proposals, by written request only, received by the Owner prior to, but not after, the time set for proposal submission. Thereafter, proposals shall be irrevocable for a period of not less than forty five (45) days, and may not be withdrawn or modified.

Any proposal which is not received by the Owner by the date and time and at the location for submission of proposals set forth herein will be determined to be late and shall not be considered.

The Owner may cancel or modify this RFS, in whole or in part, or reject all Proposals submitted in response to this RFS if such action is determined to be in the best interest of the Owner. The Owner also reserves the right to waive any irregularities or requirements; and to negotiate with all respondents, in any manner necessary, in its sole judgment and discretion, to serve the best interest of the Owner. Proposals that are incomplete, conditioned, or are otherwise not in conformance with this RFS may be rejected at the sole discretion of the Owner.

A proposal may be considered non-responsive if it includes extraneous information not specifically requested in this RFS. Clarity and conciseness of proposals will be valued over sheer volume.

The Owner reserves the right to request clarification of any aspect of any submitted proposal or to request additional information that might be required to evaluate a proposal.

By submission of a proposal, each Respondent acknowledges and agrees that all documentation and/or materials submitted with its proposal shall become and remain the property of the Owner. The Owner shall have the right to use all or any portions of any proposal, as it considers necessary or desirable, in connection with the Project. By the submission of a proposal, the Respondent thereby grants to the Owner an unrestricted royalty-free license to use the proposal and all materials submitted therewith in connection with the Project.

Respondents are advised that, once an award has been made, proposals submitted to the Owner in response to this RFS are considered public records as defined by Massachusetts General Laws, Chapter 4, §7, clause 26.

Appendix A
RFS: Library Fundraising Consultant
RFS No.: 15-04

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of person making proposal

Name of business

Appendix B
RFS: Library Fundraising Consultant
RFS No.: 15-04

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature of person submitting bid or proposal

Name of business