



Peninsula Metropolitan Park District

5717 Wollochet Dr. NW, Gig Harbor, WA 98335
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Request for Proposal PenMet Parks Fundraising Consultant RFP No. 2020.01

Addendum #1 – June 10, 2020

PROPOSAL INFORMATION

RFP No. 2020.01

Proposal Name: PenMet Parks Fundraising Consultant

Date Issued: April 13, 2020

Contact Person: Doug Nelson

E-Mail Address: dnelson@penmetparks.org

Telephone Number: 253-858-3408

Deadline for Clarifications: June 15, 2020 by 5:00 PM PST

Proposals Accepted Until: June 19, 2020 by 5:00 PM PST

SUBMIT PROPOSALS TO:

Doug Nelson

If using UPS or FEDX:

5717 Wollochet Dr NW #3

Gig Harbor, WA 98335

For USPS:

P.O. Box 425

Gig Harbor, WA 98335

ADDENDUM #1

THIS ADDENDUM SHALL BE BOUND INTO AND BECOME PART OF THE ABOVE REFERENCED RFP WHICH IS MODIFIED AS FOLLOWS:

NEW PROPOSAL DUE DATE, ADJUSTED TIMELINE, ELECTRONIC SUBMITTAL

PROJECT DESCRIPTION:

Peninsula Metropolitan Park District seeks proposals from fundraising consultants interested in working with our organization to assess the philanthropic community's interest in supporting a capital campaign; and develop a capital campaign centered around our future community recreation facility (CRC) at 2416 14th Ave. NW, Gig Harbor, WA 98335, a former golf driving range (~17 acres). The project involves the renovation of an existing building (~4,000 sq. ft.) and the addition of a new structure enclosing proposed indoor recreation space, as well as the addition of an expanded parking lot, outdoor recreation space, and trail.

“The Community Recreation Center will aid in the advancement of the District vision to enhance the quality of life in our area.”

RFP PURPOSE

In 2019, following the completion of a detailed feasibility study to include need, impact and fund management, PenMet Parks Board of Directors approved plans to move forward with the purchase of the Performance Golf Center property.

Project design elements of the new recreation campus may include indoor and outdoor recreation spaces, multi-purpose rooms, event rental space, a trail, and other possible features. The project will bring the community together by providing both active and passive recreation.

PenMet Parks serves a community of approximately 51,858 residents in the greater Gig Harbor community. Additionally, the constituents of Tacoma, Pierce and Kitsap County have taken advantage of our recreation programs, parks and facilities. We envision this facility will be regional and will attract users from all over the northwest.

PROJECT SCOPE:

PenMet Parks seeks proposals from fundraising consultants interested in working with our organization to assess the philanthropic community's interest in supporting a capital campaign; and develop a capital campaign based on such assessment. The goal of the capital campaign is to address the need for expansion and construction of a new recreation complex to better meet the growing needs of our community.

“PenMet builds community through a new recreation center”

The fundraising consultant will work with the Board of Commissioners and project staff in building the fundraising capacity, as well as the development of a fundraising strategy.

Note: The phasing plan outlined below is a suggestion only. We are open to other suggestions/options.

We anticipate a three phased project:

1. Assessment of the philanthropic community's interest
 - Identify and evaluate resources available to support a capital campaign
 - Identify challenges to a successful capital campaign
 - Identify potential prospects
 - Develop grant writing and public financing options (federal, state, local)
 - Complete an assessment of internal capabilities to support a campaign
 - Present findings to the Board of Commissioners
2. Quantify the philanthropic community's interest
 - Develop PenMet Parks case statement and story
 - Conduct confidential interviews with potential prospects
 - Determine realistic campaign goals
 - Present recommendations to the Board of Commissioners
3. Develop a campaign plan
 - Develop campaign plan, including specific goals for dollars raised, milestones and solicitation strategies
 - Develop a campaign calendar
 - Develop a campaign budget
 - Assist in the development of campaign material
 - Present recommendations to the Board of Commissioners
4. Initiate and manage the Capital Fundraising Campaign

PenMet Parks reserves the right to amend the terms of this Request for Proposal (RFP), to circulate various addenda, or to withdraw the RFP at any time.

Updated project information can be found by visiting: <https://penmetparks.org/news/capital-improvement-projects/>

RFP TIMELINE

PenMet Parks would like to move quickly in the selection of the fundraising consultant 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:

RFP issued	April 13, 2020
RFP Reissue	May 18, 2020 & June 10, 2020
Q&A Period	May 18, 2020 – June 15, 2020 at 5 PM PST
Proposals Due	June 19, 2020 at 5 PM PST
Interview(s) and Selection	June 29, 2020 – July 3, 2020
Complete negotiations and approval of contract	July 6, 2020 – July 21, 2020

MINIMUM QUALIFICATIONS:

Minimum qualifications are required for a fundraising consultant to be eligible to submit a response to this RFP solicitation. Responses should clearly show compliance with these **minimum qualifications**. Those that are not responsive to these **minimum qualifications** may be rejected by PenMet without further consideration.

This project will require a consulting firm/team with the following minimum qualifications and areas of expertise:

The consultant's team should have demonstrated expertise and at least five years of project-related experience including immense capital campaign fundraising. Demonstrated experience should be for public or private projects of similar size and scope.

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 PenMet website at: <https://penmetparks.org/news/capital-improvement-projects/>. PenMet will select the firm based on its professed ability to meet the overall expectations of PenMet Parks. The Board of Commissioners will be the judge of which submission offers the greatest benefit to PenMet Parks.

The following criteria will be used in the selection process:

- Responsiveness and completeness of the submittal.
- Experience and qualifications of consultant and management team, including demonstrated knowledge of planning, management and 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 the project objectives and scope. Ability of the consultant team to communicate and build consensus with the Board of Commissioners, staff and community residents.
- Experience with public facility fundraising projects and/or nonprofit campaign projects.
- 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.

SUBMITTAL INSTRUCTIONS AND REQUIREMENTS:

District staff will respond during the Q&A period and address questions or comments raised about the solicitation to clarify issues and technical aspects of the project.

It is the obligation and responsibility of the consulting firm to learn of addendums, responses, or notices issued by the District relative to this RFP.

Limit proposals to ten (10) sheets (cover and back not counted), 20 pages in length. Pages may be printed double sided. Provide six (6) bound hard copies, one (1) unbound copy suitable for photocopying and an electronic version via email of the RFP response.

All submittal response materials must be received no later than time and date listed in the Proposed Timeline. ~~All proposals must be in a sealed envelope and clearly marked the Proposal Name. No faxed or e-mail proposals will be accepted.~~

Due to COVID-19 considerations: email submittals will be accepted in lieu of hard copies.

Included in your submittal should be the following:

Introduction

1. Cover letter with firm’s name, address, email, phone number and website.
2. Contact person’s name, address, email and phone number.
3. Statement of philosophy.
4. A concise statement that demonstrates the organization’s understanding of the project and scope of services sought by PenMet Parks.
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 of the project.
8. Description of any additional consultants that will perform work as part of the proposal Provide names, addresses, and relevant experience for additional consultants.
9. Fee Structure – A description of the bidder’s proposed project cost.

Organizations 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 size and composition of the 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, similar projects as ours.
2. Identify five completed similar projects, that the identified key personnel have completed and the team. For these projects provide:
 - a. Name and address of client.
 - b. Name, phone number, and email address of the client contact person.
 - c. Summary of the project; include year completed.

Other Information

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

Fee Structure

1. Provide information on your proposed fee structure or estimated project costs.

QUESTIONS

Direct all questions concerning this RFP to the Primary Contact and cc’ing the Alternate Contact listed in this RFP, below. Responders may submit written questions, by e-mail only, at any time prior to the Q&A deadline identified in the Proposed Timeline. Unauthorized contact regarding this RFP with other District employees may result in disqualification of a submittal. Only written, e-mailed questions or inquiries will be accepted.

Primary Contact: Doug Nelson
E-Mail Address: DNelson@penmetparks.org

Alternate Contact: Kurt Grimmer
E-Mail Address: KGrimmer@penmetparks.org

Any questions will be answered in writing and posted on the PenMetParks.org website under <https://penmetparks.org/news/capital-improvement-projects/>

It is the responsibility of individual firms to check this website for any amendments or Q & A’s related to this RFP.

PROPOSAL PACKAGES

The complete proposal packages must be received no later than the date and time in the Proposed Timeline at the following address:

Proposal Name: PenMet Parks Fundraising Consultant
Attn: Doug Nelson

If using FedEx or UPS:
5717 Wollochet Dr NW Building #3
Gig Harbor, WA 98335

If using USPS:
PO Box 425, Gig Harbor, WA 98335

Following an evaluation of the proposals received, the respondents considered to have submitted the best proposal(s) may be requested to participate in an interview and final selection process. No further action beyond submission of the above information is required at this time.

DISCLOSURES:

- **REJECTION OF PROPOSALS:** *PenMet Parks reserves the right to reject any and all proposals and to waive irregularities and informalities in the submittal and evaluation process. This Request for Proposal does not obligate PenMet Parks to pay any costs incurred by respondents in the preparation and submission of a proposal. Furthermore, the Request for Proposals does not obligate PenMet Parks to accept or contract for any expressed or implied services.*
- **CONTRACT AWARD:** *PenMet Parks reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be initially submitted in the most favorable light. PenMet Parks shall not be bound or in any way obligated until both parties have executed a written vendor contract. The respondent selected will be expected to enter into a contract with PenMet Parks.*
- **PAYMENT:** *All invoices related to the contract shall be paid by a PenMet Parks warrant usually within 30 days of PenMet Parks' receipt of a proper invoice and PenMet Parks approval of the respondent's completed tasks/deliverables to the date of the invoice or monthly report, as appropriate.*
- **EQUAL OPPORTUNITY EMPLOYMENT:** *The successful respondent must comply with PenMet Parks equal opportunity requirements. PenMet Parks is committed to a program of equal employment opportunity regardless of race, color, creed, sex, age, nationality or disability.*
- **BACKGROUND CHECK:** *The successful respondent may be required to submit to a criminal background check. If a background check is required, the contract award shall be contingent upon PenMet Parks receipt of an acceptable background check report for any persons providing services or work under the agreement.*
- **INSURANCE REQUIREMENTS:** *The successful respondent shall maintain insurance that is sufficient to protect the respondent and PenMet Parks against all applicable risks.*
- **NON-ENDORSEMENT:** *As a result of the selection of a respondent to supply products and/or services to PenMet Parks, the successful respondent agrees to make no reference to PenMet Parks in any literature, promotional material, brochures, sales presentation or the like without the express*

prior written consent of PenMet Parks.

- **NON-COLLUSION:** *Submittal and signature of this Proposal swears that the Proposal is genuine and not a sham or collusive, and not made in the interest of any person not named, and that the Firm has not induced or solicited others to submit a sham offer, or to refrain from proposing.*
- **COMPLIANCE WITH LAWS AND REGULATIONS:** *In addition to the nondiscrimination requirements previously listed, the successful respondent shall comply with all applicable federal, state and local laws, statutes and ordinances relative to the execution of the work. This requirement includes, but is not limited to, protection of public and employee safety and health; environmental protection; waste reduction and recycling; the protection of natural resources; permits; fees; taxes; and similar subjects.*
- **PUBLIC RECORDS:** *Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this RFP (the “documents”) become a public record upon submission to PenMet Parks, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. If PenMet Parks receives a request for inspection or copying of any such documents it will endeavor to notify the person submitting the documents to PenMet Parks (by U.S. mail or by e-mail if the person has provided an e-mail address, or by fax if the person has provided a fax number) and upon the written request of such person, received by PenMet Parks within five (5) calendar days of the mailing of such notice, will postpone disclosure of the documents for a reasonable period of time as permitted by law to enable such person to seek a court order prohibiting or conditioning the release of the documents. PenMet Parks assumes no contractual obligation to enforce any exemption nor any contractual obligation to provide such notice.*