



Peninsula Metropolitan Park District

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Request for Proposal Capital Campaign Consultant RFP No. 2021.04

Proposal Information

RFP No. 2021.04

Proposal Name: PenMet Parks Capital Campaign

Date Issued: December 14, 2021

Contact Person: Nicole Jones-Vogel, Planning and
Special Projects Manager

E-Mail Address: njones-vogel@PenMetParks.org

Telephone Number: 253-858-3400

Deadline for Clarifications: Noon on January 12, 2022

Proposals Accepted Until: Noon on January 25, 2022

Submit Proposals To:

Ally Bujacich, Executive Director

abujacich@penmetparks.org

Nicole Jones-Vogel, Planning
and Special Projects Manager

njones-vogel@penmetparks.org

Project Description:

PenMet Parks is seeking proposals from fundraising professionals to provide consulting services for a \$3.1 million capital campaign to support the development of the Community Recreation Center (CRC), a planned indoor recreation center that will dramatically increase recreational opportunities available to the community. The \$31.6 million, 65,000 square foot regional facility will feature an indoor multi-purpose turf field, a gymnasium with three multi-purpose courts, an elevated walking and jogging track, and community gathering spaces. The popular multi-use regional Cushman Trail will be extended through the 17-acre site and an outdoor activity lawn will be constructed as part of the project. The CRC will transform how indoor recreation opportunities are provided to community members, and will provide necessary spaces to play, compete, recreate, and gather.

The design for the CRC is underway with construction anticipated to begin in 2022, using a phased approach. A community assessment and feasibility study was completed in 2021.

PenMet Parks is seeking proposals for Phase 1, which includes developing a campaign plan and other tasks, and a budget for Phase 2, which includes campaign management. It is expected that the scope and schedule for Phase 2 will be informed by the completed campaign plan. PenMet Parks and the selected firm may negotiate a fee for Phase 2 at the completion of Phase 1.

This project is the first major capital campaign undertaken by PenMet Parks, however one of the District's long-range goals is to structure and develop a stewardship arm, including philanthropic support. Work completed during the campaign should create an

actionable framework that the District can sustain and build upon in the future. Leadership training and development is a key component of the project.

PenMet Parks:

PenMet Parks is a metropolitan park district that serves a population of over 40,000 residents in the greater Gig Harbor community in unincorporated Pierce County. PenMet Parks' mission is to *enhance the quality of life by providing parks and recreation opportunities for our community*. Since its inception in 2004, the District has adapted to meet the needs of the community and has seen significant program growth in recent years. Strong demand for high-quality sports and recreation programs, and access to a diverse portfolio of well-maintained parks and properties, is expected to continue.

Scope of Work:

The selected firm will complete Phase 1 tasks including, but not limited to:

Phase 1: Campaign Planning (*suggested duration: 6 weeks*)

- Review the completed feasibility study and case statement.
- Develop an actionable and quantifiable campaign plan designed to support the project schedule and budget. Include elements such as the campaign schedule, required resources (budget, staff, community, materials, or other resources needed for a successful campaign), gift table, strategies, campaign budget, and objectives or deliverables for each stage of the campaign. The plan should be tailored to the specific goals, objectives, and culture of PenMet Parks, the community, and the CRC.
- Present findings and recommendations to the Board of Park Commissioners.
- Phase 1 deliverables:
 - Campaign plan and schedule.
 - Scope of work for Phase 2.
 - Professional report in electronic format that contains findings from this phase of work.

The scope for Phase 2 is dependent upon the campaign plan. Potential tasks may include:

Phase 2: Campaign Counsel and Management potential scope (*scope and duration are dependent upon campaign plan*)

- Initiate and manage capital campaign.
- Leadership development: develop and implement strategies for campaign success, and educate PenMet Parks leadership, in areas including, but not limited to:
 - Overall campaign strategy.
 - Staffing and/or volunteer leadership structure, job descriptions, and roles.
 - Engagement and solicitation strategy for each prospect.
 - Ongoing donor engagement and relations.
 - Donor recognition.

- Campaign accounting and gift agreements.
 - Community engagement and messaging.
- Facilitate and lead meetings with staff, Commissioners, and volunteer leadership as needed to meet campaign goals.
- Assist with recruiting volunteer leadership committee members, if needed.
- Write and submit proposals to foundations and institutions.
- Manage milestones and tasks required for each component of the campaign.
- Recommend and develop campaign branding and materials, which may include a campaign logo, brochure, pledge forms, invitations, gift acknowledgements, or other materials.
- Coordinate with fund manager as required.
- Track post-campaign actions required.
- Develop an actionable framework for future philanthropic efforts, including strategy, leader training and development, donor engagement, timeframes, and other recommendations to meet the long-range stewardship goals of the District. Summarize materials in a “Stewardship Toolkit”.
- Provide periodic updates to the Board of Park Commissioners.
- Potential Phase 2 deliverables:
 - Successfully completed \$3.1 million campaign.
 - Campaign branding and visual materials.
 - Professional report in electronic format that contains the outcomes from the capital campaign.
 - Stewardship Toolkit.

RFP timeline:

PenMet Parks is prepared to move quickly in the selection of the firm and implementation of the work. The selected firm should be prepared to commence work immediately after a contract is signed:

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| RFP issued | December 14, 2021 |
| Deadline for questions | Noon on January 12, 2022 |
| Responses to questions issued | Noon on January 14, 2022 |
| Proposals due | Noon on January 25, 2022 |
| Interviews (if needed) | Anticipated week of January 31, 2022 |
| Selected firm notified of intent to award | Anticipated week of February 7, 2022 |
| Contract executed | Anticipated February 16, 2022 |

PenMet Parks reserves the right to adjust the schedule.

Minimum Qualifications:

Minimum qualifications are required for a firm 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 without further consideration.

The consultant should have demonstrated expertise and at least three years of successful capital campaign experience of comparable size to PenMet Parks.

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 penmetparks.org.

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.

PenMet will select the firm based on its professed ability to meet the overall expectations of PenMet Parks. PenMet may award limited phases of the project. PenMet reserves the right to reject all proposals.

The following criteria will be used in the selection process:

- Experience and qualifications of firm and key personnel proposed to complete the work.
- Technical quality and methodology of consultant's approach to the work; ability to document information and recommendations clearly in written format.
- Understanding of the objectives and scope of work.
- Ability of the consultant team to communicate and build consensus with the Board of Commissioners and staff.
- References and examples of completed projects. Satisfaction of former clients with competency of completed work.
- Ability to complete the work within the proposed time schedule.
- Fee proposal.

RFP submittal instructions:

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

All submittal response materials must be received no later than time and date listed in the RFP timeline. Electronic submissions are preferred.

RFP submittal format:

Limit proposals to twenty (20) single-sided sheets (cover and back not counted), submitted electronically. Pages may be printed double sided. Include the following elements in the response to this RFP:

1. Introduction:
 - a. Cover letter with firm's name, address, email, phone number and website.
 - b. Contact person's name, address, email and phone number.
 - c. Statement of firm's philosophy.
 - d. A concise statement that demonstrates the organization's understanding of the project and scope of services sought by PenMet Parks.
 - e. Description of the organization's approach to the project.
2. History and experience of the firm:

- a. Location of firm.
 - b. Number of years in business.
 - c. Type of organization.
 - d. List of principals and stakeholders.
 - e. Description of size and composition of the organization.
 - f. Geographical areas of operation.
 - g. Relevant completed projects. Include at least three project references.
3. Key project personnel:
 - a. Resumes for key personnel who will be assigned to this project, including relevant experience, credentials, and references.
 4. Proposed deliverables:
 - a. List proposed deliverables for Phase 1. Include proposed deliverables not listed in the scope of work above if appropriate.
 5. Proposed schedule:
 - a. Provide a proposed schedule, including start and completion dates, for Phase 1.
 6. Fee proposal:
 - a. Provide a detailed breakdown of the firm's proposed fee for Phase 1 only. Identify proposed personnel and respective hourly rates for each task, and provide the estimated hours for each task. Provide a subtotal for each phase. Fees should be structured on an hourly basis, with a proposed not-to-exceed amount identified for each phase.
 - b. Provide a budget for Phase 2. The final scope and fee for Phase 2 may be negotiated after Phase 1 is complete.
 - c. If applicable, provide a separate fee breakout for proposed additional deliverables not listed in the scope of work (see 4a above).

Questions/Inquiries:

Direct all questions concerning this RFP to the contact identified below. Responders may submit written questions, by e-mail only, at any time prior to the question deadline identified in the RFP 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. Questions and their responses will be shared on the PenMet website (penmetparks.org).

Contact: Ally Bujacich, Executive Director
E-Mail Address: abujacich@penmetparks.org

Contact: Nicole Jones-Vogel, Planning and Special Projects Manager
E-Mail Address: njones-vogel@penmetparks.org

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.