



## **REQUEST FOR PROPOSAL**

### **Fundraising Feasibility Study**

**Issue Date:** July 26, 2024

**Proposal Due Date:** August 23, 2024, 5 p.m. EDT

**Return Proposals to:**

Elkhart Public Library  
Administrative Services  
300 South Second Street  
Elkhart, IN 46516

**Contact Person:**

Lisa Guedea Carreño, Executive Director  
574-522-3333  
[lisagc@myepl.org](mailto:lisagc@myepl.org)

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## PROJECT OVERVIEW AND TIMELINE

Elkhart Public Library (EPL/Library) is issuing a Request for Proposal (RFP) to solicit interest from qualified consultants (Firm/Consultant) to develop a fundraising feasibility study proposal (Proposal). The successful Firm/Consultant will provide expertise in determining the feasibility of running a successful capital campaign for the purposes of renovating and expanding the downtown Library's Children's and Teen spaces.

Following completion of the feasibility study, the Library will determine whether to move forward with a capital campaign and what the fundraising goal will be. If the feasibility study recommends a capital campaign, the Library reserves the right at its sole discretion to continue with the selected Firm/Consultant or another in launching and running such a campaign.

### Project Timeline:

Milestone	Date
RFP Available	July 26, 2024
Proposal Submission Deadline	August 23, 2024, 5 p.m. EDT
EPL Reviews Proposals	August 23, 2024 - September 12, 2024
Successful Candidate Notified	September 13, 2024
Draft Contract for Services Submitted	October 4, 2024
Contract Reviewed by Library and Counsel	October 7, 2024 - October 18, 2024
Feasibility Study Begins	October 21, 2024
Feasibility Study Completed and Report Submitted	December 20, 2024

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## LIBRARY BACKGROUND

**EPL Mission:** Elkhart Public Library informs, inspires, and empowers our diverse communities.

**EPL Vision:** Elkhart Public Library: Helping every person develop their fullest potential and our diverse communities grow strong and connected.

Since its founding 120 years ago, Elkhart Public Library has served our communities as the leading provider of the most valuable resource that has ever existed: information.

The Library's service area comprises the Townships of Cleveland, Osolo, and Concord, as well as the small portion of the City of Elkhart that is not encompassed by these three townships. With a staff of 96 full- and part-time employees (77 FTE) and five locations –

downtown, a branch in each of the three townships, and one on the south side of the City of Elkhart – the Library serves a combined estimated population of nearly 100,000 residents.

In addition, in 2014, Elkhart Public Library and nearby Goshen Public Library formed a consortium to share an integrated library system. This arrangement allows Elkhart cardholders to check out materials from Goshen and vice versa. A delivery service between the two cities adds the convenience of patrons being able to request and pick up items from any of the locations in either system. Elkhart Public Library also has reciprocal borrowing agreements with the four other public libraries in Elkhart County.

Elkhart Public Library's primary sources of operating revenue are property taxes (60–70 percent) and local income taxes (20–30 percent). The combined total of other regular funds accounts for 5–10 percent of total funding and includes sources such as state excise and financial institution taxes, photocopy and printing fees, reimbursement from Goshen Public Library for its share of consortium costs, and income from investments. The Library receives additional support from the Friends of the Elkhart Public Library, grants available through philanthropic organizations, monetary gifts from individuals, and sponsorships from partner organizations.

Losses from tax caps reduce the funded portion of the Library's budget each year by 9–12 percent, so we plan and monitor our spending carefully, enabling us to maintain a healthy cash flow as well as balances in both our Rainy Day Fund and Library Improvement Reserve Fund (LIRF). We intend to allocate up to \$1.5 million from LIRF towards the renovation/expansion of the children's and teen spaces in the Library.

The Library bonded in 2020 for \$4.2 million to pay for renovations and expansions of our four branches (a strategic initiative in our previous long-range plan). We will pay off this bond in 2030.

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## **CHILDREN, TEENS, AND ELKHART PUBLIC LIBRARY**

Elkhart Public Library has approximately 46,203 cardholders, 21,000 of whom are school district "ecard" users (ecards provide access to digital services for all students enrolled in schools within the Library's service area). Of the 25,203 cards that allow users to check out physical materials – books, DVDs, CDs, and audiobooks – 4,781 or 19 percent belong to individuals under age 18. Of the physical items checked out of the Library in 2023, nearly 38 percent were from the children's and teen collections, indicating a disproportionately high usage rate from this group of cardholders.

In contrast, only 11.3 percent of the available public space in the Library is dedicated to children and teens. The children's room dates back to the construction of the building in 1963 and has not increased in size since that time. Materials occupy most of the room. There is very little play space for young children and their caregivers. There is no space for programs, which must be held in the meeting rooms in the basement. As well, tutoring

rooms have been wedged into meeting rooms in the basement. Finally, the teen space is minimal and is located and configured in such a way that does not draw many teens into it.

Consequently, we have identified renovating and (if possible) expanding the children's and teen spaces in the Library as a priority initiative in the Library's 2024-2026 Strategic Plan. To that end, we contracted with an architectural firm to conduct a space feasibility study, which was recently completed and reviewed by the Board. Three options were presented, the first of which involved renovation only (not expansion), and the second and third of which expanded the building on one floor and two floors respectively.

The Library has been actively saving funds for a number of years toward renovating and expanding the children's and teen spaces and has tentatively earmarked up to \$1.5 million (in LIRF, as referenced earlier) for this project. However, this is not enough to fund any of the three design concepts presented in the space feasibility study. The first of the three options, which does not involve expansion, with an estimated cost of \$1.7 – \$2.1 million, may be achievable with additional grant monies. Cost estimates for both of the options involving expansion would require considerable fundraising in the form of a capital campaign. One of those options involves an expansion of the first floor and is estimated to cost \$4.7 - \$5.6 million. The other option involves expanding both the first and second floors, with an estimated cost of \$8.3 – \$9.9 million.

Being a tax-funded municipal corporation without its own foundation, Elkhart Public Library has no fundraising experience at the level required for either of the expansion options. Consequently, we are seeking a Fundraising Feasibility Study that would indicate whether a capital campaign is likely to be successful and if so, how best to go about it and at what level.

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## **SCOPE OF WORK**

The Fundraising Feasibility Study shall include basic processes to:

- 1. Assess the Organization:**
  - Needs and goals
  - Historical fundraising performance
  - Current financial health
  - Internal capacity to support a campaign (staff, volunteers, Board, infrastructure, etc.)
- 2. Develop and Test a Compelling Case for Support:**
  - Why the campaign is necessary and how it will benefit the organization, its stakeholders, and the community at large
- 3. Study the Broader Community:**
  - Economic conditions and forecasts
  - Demographic and psychographic profiles of potential donors
  - Potential community support for a capital campaign
  - Other fundraising efforts that might compete for donations

4. **Interview Stakeholders to Gather Insights:**
    - Board members
    - Community leaders and other key stakeholders
    - Potential donors
  5. **Identify and Evaluate Potential Major Donors**
  6. **Conduct a SWOT Analysis of the Campaign**
  7. **Provide Recommendations Based on the Findings:**
    - If the findings are positive, outline a plan for the campaign including:
      - Goals
      - Timelines
      - Staffing needs
      - Leadership structure
      - Strategies for engaging donors
      - Estimated costs of running the campaign
      - Challenges to be addressed
      - Next steps for campaign preparation and execution
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## **PROPOSAL REQUIREMENTS AND SPECIFICATIONS**

All Proposals shall contain the following elements:

1. **Project Experience:**
  - Describe a minimum of three (3) relevant projects completed that are most similar to this project.
2. **Firm/Consultant Information:**
  - Briefly describe the Firm's/Consultant's history, ownership, organizational structure and fundraising philosophy.
  - Provide office locations and contact information.
  - Identify the person authorized to execute agreements on behalf of the Firm/Consultant for this project.
3. **References:**
  - List a minimum of three (3) clients for which the Firm/Consultant has performed similar work. Include necessary contact information for the client/person.
4. **Team:**
  - Include proposed personnel for this project and their assigned roles.
  - Include key personnel resumes, similar project experience, and professional licenses and certifications.
  - Clearly identify the proposed Project Manager who would serve as the Library's main point of contact for the project.
  - Identify any outside consultants or individuals to be included in the work for Elkhart Public Library.
5. **Scope of Services:**
  - Explain the process and project deliverables along with a timeframe for each deliverable item, based on the scope of work described. Proposers are free to

propose a different process they believe may provide a better outcome for the Library. If so, explain the benefits.

**6. Professional Fees:**

- Include a total price for the feasibility study as well as a breakdown of costs.

**7. Contracts:**

- State the preferred form of agreement used by the Firm/Consultant for projects of this nature.

**8. General Information:**

- Disclose any potential conflicts of interest that the Firm/Consultant may have in performing the requested services for the Library.
- Provide a statement of assurance that the Firm/Consultant is not currently in violation of any regulatory rules, regulations, or litigation that may have an impact on the Firm's/Consultant's operations.
- Provide any other information that may help the Library evaluate the Proposal.

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## RECEIPT OF PROPOSAL

For the Proposal to receive full consideration, submit one (1) paper copy of the Proposal in a sealed envelope and one (1) electronic copy in PDF format by August 23, 2024, at 5 p.m. EDT. Proposals become the property of the Library upon submission and are subject to disclosure under the Freedom of Information Act and Indiana Public Access laws.

**Submit Printed Proposal to:**

Elkhart Public Library  
Administrative Services  
300 South Second Street  
Elkhart, IN 46516

**Electronic (PDF) Proposal:**

Lisa Guedea Carreño, Executive Director  
Phone: 574-522-3333  
Email: lisagc@myepl.org

Proposals sent by mail should allow sufficient delivery time to ensure receipt by the deadline. Proposals received after the deadline will be returned unopened.

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## EVALUATION CRITERIA

Final Proposal evaluation and selection may be based on, but not limited to, any or all of the following:

1. Proven qualifications and project experience in conducting similar feasibility studies.
2. Demonstrated track record of working with communities and stakeholder groups.

3. Ability of proposer to provide quality and timely products and services.
4. Quality of information presented in the Proposal.
5. Client references.
6. The proposer's fee for the project.
7. Other factors determined to be in the best interests of the Library.

The Library reserves the right to reject any and all Proposals; to call for new Proposals; to waive any irregularities in the Proposals if deemed in the best interest of the Library; to negotiate changes in the scope of work or service provided or portions thereof; and to select the Proposal considered most advantageous to the Library. The lowest fee may not necessarily be the most acceptable for the project. The Library shall base its award criteria on multiple factors, not just cost factors.

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## **MISCELLANEOUS**

The Library shall not be liable for any costs incurred by the proposer for the preparation or production of the Proposal or for any work performed before the execution of a contract. Proposers with questions concerning this RFP shall contact Lisa Guedea Carreño (lisagc@myepl.org) no later than ten (10) business days before the submission deadline. All questions and answers will be posted at <https://www.myepl.org/FundraisingRFP/> no later than five (5) business days before the submission deadline.

The final selection shall be made at the sole discretion of the Executive Director of the Library. The Executive Director or Board may request additional information from proposers or request personal interviews with one or more proposers.

Elkhart Public Library is an equal opportunity employer (EEO). We hire without regard to race, color, gender, religion, national origin, ancestry, citizenship, disability, age, sexual orientation, gender identity, or any other characteristic protected by law.

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