



Revised 12/4/18 – see Section VI

**Sonoma County Library
Request for Information
Fundraising Analysis and Plan Development**

- I. **CONSULTANT(S).** The Sonoma County Library is seeking qualified consultant(s) to review current fundraising activities and develop a fundraising plan for the Sonoma County Library. Although the Library has strong tax-supported funding, there has been little development or utilization of private and/or grant funds. The development of the plan will require the review of all current and possible future fundraising activities.

- II. **ELIGIBILITY.** The consultant(s) should have demonstrated experience in this type of analysis and be able to provide 2-3 samples of similar studies they have prepared. Consultant(s) should have working knowledge of current fundraising practices in multi-branch public library systems. The consultant(s) will work with the Interim Library Director, the Community Relations Manager and the Chief Financial Officer on this study. Possible activities may include but are not limited to review of current, previous and planned fundraising activities, analysis of Friends and Foundation activities, possibilities for funding for capital projects and grant opportunities.

For consideration, proposals must contain evidence of the consultant(s) experience and abilities in the specified area and other disciplines directly related to the proposed services. All consultants shall provide profiles and resumes of the staff to be assigned to the project. Proposals will be ranked in accordance with the following criteria:

- Completeness and quality of response
- Ability to meet requested service needs
- Experience with library fundraising
- Expertise and availability of key personnel
- Total cost to library
- Client references

- III. **BACKGROUND.** The Sonoma County Library, formed in 1975 through a joint powers agreement, is governed by an 11-member commission with representatives from Cloverdale, Cotati, Healdsburg, Petaluma, Rohnert Park, Santa Rosa, Sebastopol, Sonoma, Windsor and the County of Sonoma. Currently, the Library is being managed by an Interim Library Director and a recruitment for a permanent director is in progress.

The library system serves approximately 500,000 residents in the cities, towns, and unincorporated areas of Sonoma County. The Sonoma County Library employs approximately 200 FTE to operate 1 central library, 12 branches and 2 stations countywide.

Until 2017, the library system was funded almost entirely through a share of the property taxes. In November 2016, a one-eighth cent sales tax passed with 72 percent of the vote. With the additional revenue, the library's operating budget for 2018/19 is \$30.5 million.

Although the Library has strong tax-supported funding, there has been little development or utilization of private and/or grant funds. With the sales tax in place until 2026 when the measure must be reauthorized, it is incumbent on the Library to seek to diversify its funding and utilize private and grant resources beyond its public funding. For many years, the Library has operated the buildings in their service jurisdictions; and the cities, the building owners, have provided major maintenance support. Some facilities are in need of major upgrades and a new permanent branch library in Roseland, an under-resourced Santa Rosa neighborhood, is being planned. Capital campaigns for the Roseland building and/or other new facilities or expansions are under consideration but plans have not yet been fully developed.

The Library has much community support. There are ten Friends group, eight for individual branches, one for Santa Rosa that includes the Central Library and two branches and one for the Wine Library. Here is the Friends information on the library website - <https://sonomalibrary.org/about/friends-library>. The Friends in total provide about \$250,000 annually to the library system.

The Sonoma County Library Foundation (<http://scplf.org/>) also supports the Sonoma County Library. The Foundation provides about \$100,000 annually to the library system. The Foundation is spearheading a capital campaign for a new facility in the Santa Rosa neighborhood of Roseland which is currently served by a small, temporary facility.

Some of the libraries have specific trust funds that are managed by the Branch Library Advisory Boards (LABs). LAB members are appointed by Library commission members and represent the specific needs of their communities. The trust funds in total represent about \$2,800,000.

The Library receives some grants, primarily through the California State Library. There is no individual or unit currently responsible for development or fundraising.

IV. SCOPE OF WORK. The consultant will communicate regularly with the Interim Library Director, the Community Relations Manager and the Chief Financial Officer. Typical analysis to develop recommendations sought by the Library may include the following tasks:

- Review the activities of each Friends group. Most Friends groups primarily focus on book sale and advocacy activities. Some groups have permanent sale areas in branches; other sponsor regular book sales and some do both.
- Review the activities of the Library Foundation. The Foundation supports library and literacy programs and services and also is the sponsor of a free bookmobile service that is not affiliated with the Sonoma County Library.
- Review the trust funds that have been established for the various branches and/or services. An detailed inventory of the value of the trusts and terms and conditions for use would be desirable.
- Although this study is not a feasibility analysis, investigate funding possibilities for the Roseland Branch Library, set in an under-resourced Santa Rosa neighborhood that is serving low-income families that have little access to public services.
- Analyze any grant funding that the Library has received, any patterns in that funding and identify possible grant or private funding opportunities that the Library could consider.
- Meet with key representatives of Friends groups, the Foundation, the Library Commission and management staff to understand the culture and priorities of the library system.

- Prepare recommendations for an effective approach to fundraising that can support and advance the Library’s key priorities.

After the contract is awarded to the successful consultant(s), a detailed project-scoping meeting will be held with the Interim Library Director, the Community Relations Manager and the Chief Financial Officer. The Library will provide materials, policies, reports, etc., as requested by consultant(s) in a timely manner and a specific project timeline and details will be confirmed. It is recommended that consultant(s) make one visit to Sonoma County Library to meet with staff and visit branches and plan for a presentation of recommendations to the Library Commission. The presentation could be in-person or virtual.

V. TENTATIVE SCHEDULE

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| • November 20, 2018 | RFI Issued |
| • December 10, 2018 | Proposals Due |
| • December 11 -14, 2018 | Proposals Reviewed, possible calls with consultant(s) |
| • December 17, 2018 | Contract Awarded |
| • December 18- 21, 2018 | Kick-off virtual meeting |
| • January/February 2019 | Analysis, visit |
| • March 2019 | Recommendations developed and reviewed with staff |
| • April 2019 | Presentation to Library Commission, in person or virtual |

VI. FORMAT AND CONTENT OF PROPOSAL

PLEASE NOTE THAT THE LIBRARY HAS ESTIMATED COST OF THIS STUDY AT \$15,000 INCLUDING TRAVEL EXPENSES.

- Cover letter.** Please include the RFI subject, name of consultant(s), address, contact person with all applicable contact information, and date of preparation.
- Qualifications.** Describe the background, experience, and capabilities of consultant(s) as it relates to the Scope of Work outlined above. Highlight any similar studies done in the last five years.
- Scope of Services.** Provide a scope of services and a proposed outline of tasks, products, and schedules. Provide comment on the feasibility of the proposed timeline. Also, identify the extent of Library personnel involvement anticipated to be necessary.
- Cost.** Provide cost proposal for scope of services including fixed costs, fees, expenses, reimbursable costs, and any other anticipated costs.
- Consulting staff.** Provide the name, title, background, and experience of the primary consultant(s) for this project.
- Insurance.** List all relevant insurance policies and coverage amounts carried by the consultant(s). The selected consultant(s) will be required to submit evidence of and comply with all insurance requirements deemed necessary by the Commission.
- References.** Provide a list of at least three clients the consultant(s) have contracted with in the past three years who can verify ability to provide the scope of services requested. Provide name, title and complete contact information for each reference.

h) **Additional Services.** The selected firm is welcome to outline additional services or alternative approaches that it feels are in the best interest of the Sonoma County Library.

VII. PROPOSAL SUBMISSION. Deadline for electronic submission is December 10, 2018 at 5:00 pm PST. Please send an electronic copy of your proposal to jdemapan@sonomalibrary.org. Submit a signed original of your proposal to Sonoma County Library Director's Office, 6135 State Farm Drive, Rohnert Park, CA 94928 within three business days of December 10. The selected consultant(s) will be notified on or before December 17, 2018.

Proposals should be limited to 10-15 pages and be prepared simply and economically, with an emphasis on completeness and clarity of content. Proposals should not contain staples or bindings that impede easy photocopying of materials.

Contact Susan Hildreth, Interim Library Director, shildreth@sonomalibrary.org, 707-806-7763 for questions or further information. Any further information that is made available as a result of questions will be added to the RFI.