



FUNDRAISING CONSULTANT SERVICES

Capital Campaign

REQUEST FOR QUALIFICATIONS

The SPARK*SF Public Schools (“SPARK*”) Board of Directors plans to engage in a capital campaign to raise funds for completion of the San Francisco Unified School District (“SFUSD” or “District”) **ArtsCenter** located at 170 Fell Street, San Francisco, CA, 94102.

The SPARK* SF Public Schools Board of Directors seeks the assistance of an organization or individual who has a proven track record in conducting capital campaign planning studies, as well as developing and executing successful campaign plans.

Based on a needs assessment, community input, and conceptual drawings developed by Mark Cavagnero Associates, an architectural firm, the anticipated amount of the entire ArtsCenter project will be as much as \$300MM.

Through the support of a public private partnership nearly two-thirds of the funds have been raised or could be acquired through various state resources and potential matching fund opportunities. The SPARK* Board of Directors intends to fundraise the remaining \$100-125MM needed for programing cost.

VISION - Why ArtsCenter and why now?

We believe the arts are an essential part of every child’s educational experience. With tremendous support from San Francisco residents, all SFUSD students continue to have access to an array of visual and performing arts throughout their educational journey. Now, it is time to build and strengthen this foundation by creating an **ArtsCenter** for San Francisco’s children and youth at the center of the City’s arts corridor.

The ArtsCenter will be the new home for the Ruth Asawa School of the Arts, the SFUSD Arts Institute, and a custom-built theater. It will become a vital arts education institution located in the heart of the San Francisco Arts Corridor, which already includes the Herbst Theater, the War Memorial Theatre, the Opera House, Davies Symphony Hall, the San Francisco Conservatory of Music, the San Francisco Ballet, SF JAZZ, the Asian Art Museum, and ACT’s Strand Theatre.

We owe it to all of our students to create exceptional learning experiences, and we have an obligation to San Francisco’s residents to breathe life back into a central city block – one whose historic buildings speak to a majestic past and beckon an arts renaissance. The **ArtsCenter** is in equal parts an obligation and an opportunity, providing a central hub for world-class arts education that reflects our commitment to our teachers, students, families, and our community.

ORGANIZATIONAL BACKGROUND

Founded in 2015, Spark*SF Public Schools is a nonprofit foundation composed of dedicated and dynamic professionals raising funds and advocating on behalf of SFUSD. Created to serve as a central structure for investing directly in strategic initiatives designed to prepare students to compete and thrive in today’s world, SPARK* is committed to making the District’s Vision 2025 a reality. Supervised by a board of seasoned and emerging public education advocates, SPARK* partners with the SFUSD Board of Education to attract new funders and strategic partnerships, while monitoring the use of the private and philanthropic investments.

PURPOSE AND SCOPE

SPARK* is seeking detailed submissions (“Proposals”) in accordance with this Request for Qualification (“RFQ”) from fundraising consultants with the experience and capability to manage a multiyear capital campaign to raise the remaining financial resources necessary to begin construction of the SFUSD **ArtsCenter**, substantially concluding the campaign by June 30, 2021.

The purpose of this RFQ is to retain a fundraising consultant who will manage a three-phase capital campaign, as follows:

Phase 1 - Conduct a Campaign Planning Study

- a. Assist in the development of a video case study
- b. Work with SPARK* to identify key prospects and communication groups
- c. Conduct confidential interviews with key stakeholders and donor prospects
- d. Determine realistic campaign goals

Phase 2 – Develop a Campaign Plan

- a. Develop a capital campaign plan and calendar
- b. Develop collateral materials and social media networking
- c. Train Board, volunteers, **ArtsCenter** Advisory Council, SFUSD Board of Education and staff
- d. Assist in development of a volunteer Campaign Leadership Group

Phase 3 – Execute/Manage the Campaign

- a. Manage campaign prospects, cultivation, and evaluation
- b. Develop campaign materials
- c. Oversee prospect calls and follow-ups assisted by volunteers
- d. Promote donor stewardship and cultivation
- e. Work with **ArtsCenter** Advisory Council to identify potential campaign events
- f. Develop donor tracking and assist with donor recognition
- g. Work with SFUSD communications department on the management of public information and public relations plan

PROPOSAL FORMAT AND REQUIREMENTS

Proposers must respond to the questions in the order presented below, and may provide additional supporting documentation (beyond the 20 page limit stated above) pertinent to clarification of their Proposal.

- (1) **Proposals:** Proposers must furnish one (1) original and ten (10) copies of their Proposal. Proposers must limit their Proposal to 20 pages (not including staff resumes and other supplemental items discussed below).
- (2) **Costs:** Provide an itemized cost of your services segmented by the three phases listed above. Identify any and all costs associated with managing the capital campaign. Estimated price for services must be provided, separately (beyond the 20 page limit stated above) listing the breakdown of charges for the scope of services in a sealed envelope marked “Estimated Price for Services.”
- (3) **Description of the firm:** Describe structure, areas of expertise, time in business, number of employees and other data that helps to characterize the firm. Include address(es) of the main office and the office that will manage the project.
- (4) **Experience:** Briefly describe five (5) recent projects executed by the firm to demonstrate experience relevant to the Proposal. What is the success rate of projects/ organizations for which you have managed capital campaigns? These should be relevant public sector clients for whom you have performed similar work in the past ten (10) years. For each project listed, provide the name, address, and a contact name of the client’s representative who can be contacted regarding your performance. Include the name of the lead firm in cases where you worked in partnership or in an auxiliary capacity.
- (5) **Personnel:** Provide professional resumes for the key people to be assigned. Include those of consultants and describe their relevant experience. Describe proposed responsibilities of key people. Identify the person who would be the primary contact point for the client. Provide an organizational chart of the project team.
- (6) **Process narrative:** Describe how the firm proposes to execute the project. What is an appropriate timeframe for both the campaign planning study and the fundraising itself? Descriptions of experience with similar projects that demonstrate effective work are welcome, as are brochures that would help evaluate your firm. Submit a statement on why you believe your firm is best qualified to carry out the project.
- (7) **Organizational analysis and support:** Please discuss in your response how your Phase 1 Campaign Planning Study would address the following:
 - a. SFUSD’s real and perceived strengths and weaknesses in fundraising
 - b. The community’s perception of the project
 - c. Who are potential project allies and who might oppose a campaign?
 - d. Who might be leaders in the fundraising effort, both within the arts community and among other residents?
 - e. Names of potential major donors/funders
 - f. Identification of the amount of money that can be reasonably raised
 - g. In addition to determining how much money can be raised, what other purposes does the campaign study findings report serve?

- h. What other major fundraising campaigns are launching that might compete for the same donors?
- i. Possible alternatives for raising funds
- j. What roles would SPARK*, SFUSD Board of Education members, SFUSD leadership, and the ArtsCenter Advisory Council have to take in the study and in a campaign?
- k. What training would be required to fill leadership positions and committee selections?

SUBMISSION DEADLINE AND CONSULTANT SELECTION

Proposals in response to this RFQ must be received by noon on September 13th, 2017 (the “Submission Deadline”) and must be directed to: SPARK*SF Public Schools, **ATTN: Don Daves-Rougeaux**, 135 Van Ness, San Francisco, CA 94102. Proposals must state “Proposal for Capital Campaign” on the outside of the Proposal package.

The SPARK* **ArtsCenter** working group may or may not choose to conduct telephone, online or in-person interviews. Following Proposal scoring, the top ranked firms or individuals, including the staff to be assigned to this campaign, will be expected to travel to San Francisco at its/his/her expense for an interview.

Proposals will be evaluated and scored by the SPARK* **ArtsCenter** working group in its sole discretion based on the criteria in Appendix A of this RFQ.

If an award is made under this RFQ, SPARK* will enter into contract negotiations with the highest-scoring Proposer. If contract negotiations fail to reach an executed contract within a reasonable timeframe in the sole discretion of SPARK*, SPARK* reserves the right to proceed with contract negotiations with the firm scoring second-highest, and so on.

QUESTIONS

Questions regarding this RFQ must be addressed in writing to Don Daves-Rougeaux at **rougeauxd@sfusd.edu**.

Proposers are not to contact SPARK* or SFUSD staff (except Don Daves-Rougeaux, as above) or members of the SFUSD Board of Education about this RFQ or the selection process. Any Proposers who violate this requirement will be disqualified from further consideration.

Schedule of Key Dates

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| 1. Request for Qualification Distributed: | August 27 th – September 13 th |
| 2. Vendor Questions Due: | No later than September 6 th |
| 3. Notify finalist via email / Schedule Interviews | September 22 nd |
| 4. Interviews: | September 25 th – October 5 th |
| 5. Finalist Selected: | October 11 th |
| 6. Firm Leads to meet SFUSD and SPARK* Leads | On or around October 13 th |

Evaluation Criteria - SPARK* ArtsCenter Capital Campaign

The determination of those firms that are qualified, interested, and available and the SPARK* ArtsCenter working group's choice of the best qualified will be based on the following criteria:

1. The firm's proposed approach to the work and how it meets SPARK*'s needs under the RFQ. Including Fee Structure. (80%)
2. Qualifications and experience relevant to the scope of work including specific experience with capital campaigns of similar size, including the experience of the team that would work on this project. (15%)
3. Past performance as determined by recent and relevant contracts. The evaluation will be based on information obtained from references provided by the firm as well as other relevant past performance information obtained from other sources known to SPARK*. (5%)

Process for Selecting Firm

The SPARK* ArtsCenter working group will review each firm's qualifications to determine which are most highly qualified to perform the required work. An interview will be conducted with the highest ranked consultants. Rankings will be made by the working group following evaluation and scoring of the Proposals.

Those firms invited to interviews will be notified of the dates and times of their interviews. The key proposed project staff will be expected to attend the interview. The interview will start with an opportunity for the firm to present its proposal and its project team. The interview will be an opportunity for the working group to review the Proposal, the firm's history, and other matters the working group deems relevant to selecting the firm. The working group may inquire as to the firm's suggested approaches to the projects and the issues identified in this RFQ.

A final determination/award will be made on October 5th, 2017. Firms that have not been selected shall be so notified in writing after the conclusion of the selection process.

RFQ TERMS & CONDITIONS

- (1) Submitted Proposals and all Proposal materials shall become the property of SPARK* and may be used by SPARK* in any way deemed appropriate by SPARK*.
- (2) No Proposal, Proposal details, reports, information, or data given to or prepared by a Proposer used in its Proposal to SPARK* under this RFQ shall be made available to any individual or organization by any Proposer without the prior written approval of SPARK* until after an award is made.
- (3) All information contained in this RFQ and acceptable provisions of the Proposer's Proposal may be attached to and made part of the executed contract,

if an award of contract is made.

- (4) SPARK* is an equal opportunity employer. Businesses owned and operated by minorities or women are encouraged to submit Proposals. Proposers understand and agree that in submitting a Proposal under this RFQ, the Proposer agrees that in providing services to SPARK*, it is Proposer's obligation to comply with SFUSD Board of Education Policy 0410, which SPARK* adopts for purposes of this RFQ as its non-discrimination statement, which requires that all agency programs, activities, and practices be free from discrimination based on race, color, ancestry, national origin, ethnic group identification, age, religion, marital or parental status, physical or mental disability, sex, sexual orientation, gender, gender identity or expression, or genetic information; the perception of one or more of such characteristics; or association with a person or group with one or more of these actual or perceived characteristics.
- (5) Notwithstanding any indication by any Proposer of confidential contents, and with the exception of bona fide confidential information, contents of Proposals may constitute public documents subject to disclosure under the California Public Records Act after award, if an award is made.
- (6) Prohibited Interests.
 - a. No officer, employee or agent of SPARK* who is authorized in such capacity and on behalf of SPARK* to negotiate, make, accept, or approve, or to take part in negotiating, making, accepting or approving any agreement, shall become directly or indirectly interested financially in a contract between the Firm and SPARK* or in any part thereof. No officer, employee, or attorney of or for SPARK* who is authorized in such capacity and on behalf of SPARK* to exercise any executive, supervisory or other similar functions shall become directly or indirectly interested financially in a contract between SPARK* and the Firm or in any part thereof.
 - b. Proposer shall receive no compensation and shall repay SPARK* for any compensation received by the Firm from SPARK* as a result of the Firm's proposal, should Proposer aid, abet or knowingly participate in violation of this Section.
- (7) Insurance. The following insurance requirements will apply to any contract arising from this RFQ, if an award is made.
 - a. The Firm shall maintain insurance in the following minimum amounts:
 - i. Commercial General Liability Insurance with limits not less than \$1,000,000 (one million dollars) each occurrence Combined Single Limit for Bodily Injury and Property Damage.
 - ii. Workers' Compensation Insurance, with Employer's Liability limits not less than \$1,000,000 (one million dollars) each accident.
 - iii. Professional Liability (E & O) Insurance with limits not less than \$2,000,000.00 (two million dollars) each occurrence and in the aggregate. Coverage must at a minimum apply to negligent Errors and Omissions arising out of professional services,

- performed under the contract, with any deductible not to exceed \$100,000 each claim.
- b. Commercial General Liability policy must provide the following:
 - i. **Name as Additional Insured SPARK*, its Board, officers and employees.**
 - ii. That such policy is primary insurance to any other insurance available to the Additional Insured, with respect to any claims arising out of a contract between SPARK* and the Firm and that such policies apply separately to each insured against who claim is made or suit is brought.
 - c. If any policies are written on a claims-made form, the Firm agrees to maintain such insurance continuously in effect for three years following completion of the agreement or extend the period for reporting claims for three years following the completion of the agreement, such that occurrences which take place during the agreement period shall be insured for three years following completion of the agreement.
 - d. The Firm shall provide SPARK* with the appropriate certificate(s) of insurance prior to commencing performance. The Firm shall also be obligated to notify SPARK* in writing at least 30 (thirty) days in advance of any cancellation, non-renewal or reduction of any of its insurance policies required under the contract. The Firm also understands and agrees that SPARK* may withhold payment for services performed for any violations of the insurance provisions of the agreement.
- (8) Invoices. Unless specified otherwise, the winning Firm shall provide to SPARK* detailed invoices for services rendered under the contract, if a contract is awarded under this RFQ. Invoices shall be submitted in a timely manner.

Reservation of Rights by SPARK*

The issuance of this RFQ does not constitute an agreement by SPARK* that any contract will be awarded and/or entered into by SPARK*. SPARK* expressly reserves the right at any time to:

- (1) Waive any minor defect or informality in any Proposal;
- (2) Prior to the Submission Deadline for Proposals, modify the RFQ or Proposal requirements or procedures, modify the selection procedures, including without limitation: deadlines for accepting Proposals, the specifications or requirements for any materials, products, equipment or services to be provided under this RFQ. Any such modification shall be made in writing by addendum to this RFQ or by other writing posted to the [webpage](#) to which this RFQ was posted. Proposers are responsible for checking that website regularly for any updates and postings that may be provided;
- (3) Reject all Proposals;
- (4) Reissue a Request for Qualification;
- (5) Procure any services specified in this RFQ by any other means;
- (6) Negotiate costs with one or more Proposers; and/or
- (7) Determine that no project will be pursued.

- (8) Nothing in this Reservation of Rights section shall limit or restrict any other rights or remedies available to SPARK*.

Proposer's Costs

All costs incurred in the preparation and submission of a Proposal, and Proposer interview, as applicable, shall be entirely the responsibility of the Proposer and shall not be chargeable either directly or indirectly to SPARK*.

False and Misleading Statements

A Proposal that contains false or misleading statements, or which provides references that do not support an attribute or condition contended by the Proposer, may be rejected. If, in the opinion of SPARK*, such information was intended to mislead the Project in its evaluation of the Proposal or of a Proposer attribute that is a condition or capability required under this RFQ, the Proposal may be rejected.

Errors and Omissions in RFQ

Proposers are responsible for reviewing all portions of this RFQ for promptly notifying SPARK*, in writing, if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the RFQ. Any such notification should be directed to SPARK* (pursuant to the "Questions" section below) promptly after discovery, but in no event later than September 6, 2017 five (5) working days prior to the Submission Deadline. Modifications or clarifications will be made as needed, at the discretion of SPARK*, by addenda as provided for in the "Change Notices" section of this RFQ.

Errors and Omissions in Proposal

Failure by SPARK* to object to any error, omission, or deviation in a Proposal will in no way modify the RFQ or excuse the Proposer from full compliance with the specifications of the RFQ or any contract awarded pursuant to the RFQ.

Change Notices

SPARK* may modify the RFQ, prior to the Submission Deadline, by issuing an addendum, change notice or other notification which will be posted on the [webpage](#) to which this RFQ was posted. The Proposer shall be responsible for ensuring that its Proposal reflects any and all such addenda, change notices or other notifications issued by SPARK* prior to the Submission Deadline regardless of when the Proposal is submitted.

Therefore, SPARK* recommends that all Proposers consult the website frequently, including shortly before the Submission Deadline, to confirm that the Proposer has seen and addressed any and all such addenda, change notices or other notifications.

Term of the Proposal

Submission of a Proposal signifies that the Proposer's offer of proposed services, deliverables and prices shall be binding on the Proposer and valid for a minimum of 120

calendar days from the submission deadline detailed in this RFQ, and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. Notwithstanding the foregoing, SPARK* reserves the right to negotiate costs with Proposer(s) in its sole discretion.

No Waiver

No waiver by SPARK* of any provision of this RFQ shall be implied from any failure or delay by SPARK* to recognize and take action with regard to any failure by a Proposer to observe any provision of this RFQ.

EQUAL EMPLOYMENT OPPORTUNITY

Successful contract bidders must comply with provisions of all applicable federal law, Title VI and Title VII of the Civil Rights Act of 1964. Any subcontracting by the successful bidder subjects the subcontracting firm(s) to the same provisions of the federal law.