

Request for Proposal

Fundraising Consultant for a Capital Campaign

Avalon Theatre Foundation, Inc.
P.O. Box 2243
Grand Junction, CO 81502

February 2011

REQUEST FOR PROPOSAL FUNDRAISING CONSULTANT FOR A CAPITAL CAMPAIGN

Table of Contents

Section

1. PURPOSE
2. REQUIREMENTS
3. BACKGROUND
4. SCHEDULE
5. PROPOSAL FORMAT AND REQUIREMENTS
6. QUESTIONS

REQUEST FOR PROPOSAL

FUNDRAISING CONSULTANT FOR A CAPITAL CAMPAIGN

Bidders may submit proposals addressed to the Avalon Theatre Foundation, Inc., P.O. Box 2243, Grand Junction, CO 81502 until March 19, 2011. Each proposal shall include one original hard copy submitted to the above post office box and one electronic copy either submitted by email to michael@gjsymphony.org or on USB Flash Drive submitted with the hard copy. All materials must be received by March 19, 2011.

SECTION 1.0 - PURPOSE

The Avalon Theatre Foundation, Inc. (ATF) is seeking proposals from fundraising consultants interested in managing a Capital Campaign to raise the funds needed to renovate the historic Avalon Theatre into a fully functional, multi-purpose performing arts facility with special emphasis on accommodations for symphony orchestra performances. The Avalon Theatre is located in downtown Grand Junction, (CO). The amount needed for the first phase of the renovation is estimated to be approximately 7 million dollars, with the entire three-phase project estimated to approximate 14 million dollars.

In June of 2010, the Downtown Development Authority (DDA), the Grand Junction Symphony (GJSO) and the City of Grand Junction engaged Westlake Reed Leskosky (WRL) to do a Master Plan Study which encompassed a Building Assessment, Concept Design and a Business Plan. This Capital Campaign is to raise the funding necessary for design and construction of the Phase One of this Master Plan. A Financial Feasibility Study was performed by Third Sector Innovations (TSI) in August of 2010. This study was revisited by TSI in November 2010 to take into consideration changes since then. The WRL Master Plan Study may be viewed at www.avalontheatrej.org. Contact Michael Schwerin at michael@gjsymphony.org to request a copy of the TSI Feasibility Study.

SECTION 2.0 – REQUIREMENTS

The purpose of this Request for Proposal is to retain a Fundraising Consultant who will: 1) review and evaluate the previously done Third Sector Innovations Feasibility Study of the Avalon Theatre Capital Campaign; 2) work with the Avalon Capital Campaign Steering Committee (ACCSC), ATF Board, DDA/GJSO Staff and Boards to plan and implement the Capital Campaign 3) work with the ACCSC, ATF Board, DDA/GJSO Staff and Boards to manage, track progress and ensure the Capital Campaign's success. We anticipate the Phase One renovation Capital Campaign will be implemented in three phases as follows:

2.1 PHASE 1 – Campaign Feasibility Assessment – Assess readiness and capacity for a Capital Campaign by:

2.1.1 Reviewing the TSI Capital Campaign Feasibility Assessment – Assess readiness and capacity for a Capital Campaign

2.1.2 Support development of a case statement.

- 2.1.3 Work with ACCSC, ATF Board, DDA/GJSO Staff to develop a budget.
 - 2.1.4 Develop Campaign plan and calendar
 - 2.1.5 Clarify and streamline ACCSC, ATF Board, DDA/GJSO Staff duties and requirements.
 - 2.1.6 Provide training as necessary.
 - 2.1.7 Develop a long-term strategy for the full 14 million dollar campaign.
- 2.2 PHASE 2 – Campaign Planning - Prepare detailed plans for the Capital Campaign for Phase One of the renovation (7.5 million dollar campaign) to include but not be limited to the following:
- 2.2.1 Assist in donor stewardship and cultivation.
 - 2.2.2 Identify donors by constituency.
 - 2.2.3 Set goals (gift charts), develop fundraising strategy and timing.
 - 2.2.4 Assist in developing collateral materials for launch of the Capital Campaign.
 - 2.2.4 Create individual donor packets.
 - 2.2.5 Coordinate capital campaign implementation with ACCSC, ATF Board, and GJSO/DDA staff.
 - 2.2.6 Assist in donor recognition and naming opportunities and coordinate with existing Avalon donor recognition.
- 2.3 PHASE 3 – Campaign Execution and Management – Manage with ACCSC, ATF Board, GJSO/DDA Staff the successful completion of the Capital Campaign to include but not be limited to the following:
- 2.3.1 Manage the public information and public relations plan.
 - 2.3.2 Focus on active cultivation and solicitation of major gift prospects.
 - 2.3.3 Assist with grant proposals to state and national foundations and corporations.

SECTION 3 – BACKGROUND

Background - The City of Grand Junction is located in Mesa County, Colorado on the western slope of the Rockies, midway between Denver, Colorado and Salt Lake City, Utah. Grand Junction serves Western Colorado and Eastern Utah as a regional hub for commercial and retail business, higher education, medical services, and recreational opportunities. It is the County Seat and is the largest city on the western slope of Colorado with a population of approximately 55,000 within the City of Grand Junction and approximately 135,000 county-wide. The county is approximately 3,300 square miles in area, with terrain varying between mountains, wide valleys, and narrow canyons.

Due to the vast diversity Western Colorado provides, the County has become a popular place for relocation and recreation. From 1990 to 2000 Mesa County's population grew by 24.8%, putting it in the top 10% of counties nationwide in terms of population change. The Colorado Department of Local Affairs projects Mesa County's population will grow to 224,820 by 2025 (92.3% growth from 2000).

The Avalon Theatre was constructed in 1923 as a vaudeville house, renovated in 1947 as the Cooper Theatre for film. It received significant renovation in the early 1990's, restoring the historic façade, lobby, etc. for concerts and film presentation. Since that time, the theatre has been studied from various perspectives to determine the appropriateness of investing further in the venue to allow the various user groups to be artistically and economically viable. This effort has identified deficiencies in storage, wing space, dressing rooms, lobby, concession, rest room facilities, seats and interior treatments, including acoustics.

During the fall of 2009, the City of Grand Junction entertained an RFP for a Master Plan for the Avalon Theatre. This Master Plan was funded by the GJSO and DDA and was awarded to Westlake Reed Leskosky, an Architecture, Engineering and Theatre Specialist. This Master Plan, including Building Assessment, Concept Design and a Business plan by AMS Planning, was completed in June of 2011 and is available at the Foundation's website: www.avalontheatre.org

The Grand Junction Symphony Orchestra, projected to be the major tenant of the Avalon Theatre, is a non-profit organization that performs symphonic music, presents educational programming and several special events throughout the year. 2010-11 marks the GJSO's 33rd season. Additional information can be found at www.gjsymphony.org.

The DDA Board of Directors has approved a match of one dollar for every three dollars the Avalon Theatre Capital Campaign raises up to a cap of three million dollars. The capital campaign will need to make best efforts to comply with the timeline conditions set forth in DDA's matching pledge, which currently requires enough pledges to cover the Phase One renovations to be received by June 30, 2014, enough pledges to cover the Phase One improvements to be paid by June 30, 2016, and the Phase One improvements to be completed by Dec. 31, 2017.

SECTION 4 - SCHEDULE

February 14	RFP issued.
February 25	Bidders questions due to ATF.
March 19	Proposals due to ATF.
April 1	Finalists selected and notified by telephone.
April 4-16	Finalists presentations to ATF.
April 22	Bidders notified of final decision by telephone.
May 2	Capital Campaign Consultant begins work.

SECTION 5 - PROPOSAL REQUIREMENTS

Your proposal shall address the following topics. You may submit alternate proposals, but only after the required topics are addressed.

SECTION 5.1 - ADMINISTRATION, ORGANIZATION & STAFFING

- 5.1.1 Describe your campaign process. What distinguishes your processes and approach from those of others?
- 5.1.2 Provide a proposed implementation schedule.
- 5.1.3 What information and recommendations will be included in the campaign plan?
- 5.1.4 What are the consultant's role and responsibilities during the campaign?
- 5.1.5 Provide details regarding the resources and involvement that you will require from us. What are your expectations of the ACCSC, ATF Board and DDA/GJSO Staff during the campaign process?
- 5.1.6 What other services will you provide which will add value to our Capital Campaign?

SECTION 5.2 - PAST PERFORMANCE

- 5.2.1 Please provide us with a list of your clients in the past five years.
- 5.2.2 Are you presently doing any work in the Colorado area? If so, for whom and where?
- 5.2.3 Provide information regarding your knowledge/experience with Theatre Capital Campaigns.
- 5.2.4 Please provide us with three client references we can contact including name, title, organization and telephone number.
- 5.2.5 Provide a sample of previous work related to carrying out a capital campaign.

SECTION 5.3 - STAFF DEVELOPMENT

Board and Staff development is important to the success of this campaign. Explain how you would provide education, advice, guidance and assistance to ATF Board, ACCSC, and DDA/GJSO Staff to help this campaign succeed.

SECTION 5.4 - COST PROPOSAL

Provide a detailed cost proposal for the Phase One Capital Campaign (7.5 million) for your services. Please indicate your interest in continuing the engagement through Phase 2 and Phase 3 of the Campaign. It is the ATF'S intent to work with consultants who subscribe to the Association of Fundraising Professionals Ethical Fundraising guidelines.

SECTION 6 - QUESTIONS

All questions pertaining to this proposal shall be submitted in writing by email to Michael Schwerin (michael@gjsymphony.org) no later than February 25, 2011. After this date no further inquiries, concerns or questions may be submitted. Questions will be answered to all parties receiving this request from the Avalon Theatre Foundation, and will also be posted on the website (www.avalontheatergj.org) by March 4, 2011.

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