



Request for Proposals (RFP)

CAMPAIGN FEASIBILITY STUDY

FILE NO. 06252019DEV

Date: June 25, 2019

Purchasing Department
Detroit Zoological Society
8450 W. 10 Mile Rd.
Royal Oak, MI 48067
Email: purchasing@dzs.org

1. RFP Cover

Item	RFP Title	Campaign Study
A	RFP File Number	06252019DEV
B	RFP Description	The Detroit Zoological Society is seeking bids from consulting firms experienced in conducting campaign feasibility studies.
C	Purchasing Contact	Kelly Birmingham Detroit Zoological Society 8450 W. 10 Mile Road Royal Oak, Michigan 48067
D	Method to Submit Proposals	Email an electronic submission to purchasing@dzs.org by the deadline indicated in Item I of this page. Mail four (4) manual submissions to the Purchasing Contact
E	Competitive Bid Opportunity Announcement	Tuesday, June 25, 2019
F	Deadline to Submit Questions	Friday, July 19, 2019 (tentative)
G	Deadline for DZS Response to Questions	Friday, July 26, 2019 (tentative)
H	Deadline for Proposal Submission	Friday, August 9, 2019 (tentative)
I	Capabilities Presentation	Tentatively scheduled for the week of August 19, 2019 (times TBD) Detroit Zoological Society 8450 W. 10 Mile Road Royal Oak, Michigan 48067 Board Room – Administration Building
J	Award Decision	No later than August 30, 2019 (tentative)
K	Contract Negotiations	Begin immediately after award decision is made
L	Term of Agreement	Term of the agreement shall commence upon receipt of an executed agreement, and until the scope of service is complete, but no later than March 31, 2020.
M	Bid Submittal Requirement	The DZS expects all firms that submit a proposal to submit their best offer.

2. Overview

2.1 Purpose

The Detroit Zoological Society (herein after referred to as the “DZS”) is requesting proposals from firms (“Offerors”) that have the available resources and capability to work with the DZS to conduct a fundraising feasibility study and internal development audit to assess the DZS’s current capacity to conduct a comprehensive capital campaign. The purpose of this campaign is to complete several compelling capital projects at the Detroit Zoo and Belle Isle Nature Center, and to build the new Great Lakes Nature Center. The campaign will also add to the DZS endowment and maximize resources for other mission-related activities. The feasibility study will be conducted along with Board leadership and the professional Development staff. It will guide DZS in creating and implementing a comprehensive plan to secure support from individuals, foundations and corporations to fully meet the organization’s philanthropic potential, deliver on its mission, and expand its impact.

2.2 DZS at a Glance

The DZS is a non-profit organization that operates the Detroit Zoo (Zoo), Belle Isle Nature Center (BINC) and the new Great Lakes Nature Center. The organization has over 56,000 member households, about 250 full and part-time employees, and over 1,100 volunteers, docents and gardeners who donate more than 100,000 hours of service each year. Accredited by the Association of Zoo & Aquariums, the DZS’s statement of purpose is “*Celebrating and Saving Wildlife.*”

The Zoo is the largest and one of the most beloved family attractions in Michigan with over one million visitors annually. Situated on 125 acres of naturalistic habitats, it is home to approximately 2,400 animals representing 235 species. Major facilities include The Polk Penguin Conservation Center, Arctic Ring of Life, Australian Outback Adventure, Great Apes of Harambee, National Amphibian Conservation Center, and the Wildlife Interpretive Gallery, among others.

The BINC sits on many acres of undisturbed natural wetland habitat and provides year-round educational, recreational and environmental conservation opportunities for the community. It features a deer encounter, turtle habitat with native Michigan turtles and indoor beehive allowing year-round viewing of bee behavior.

The Great Lakes Nature Center will be home to a number of Great Lakes fish, including lake sturgeon and paddle fish – which are now extinct in the Great Lakes – and will focus on conservation efforts for these and other endangered species. It will include habitats for native amphibians, reptiles, small mammals, shorebirds, and birds of prey – many of which will have been rescued and are non-releasable – and will also feature a native butterfly garden.

For more information, visit www.detroitzoo.org, <https://belleislenaturecenter.detroitzoo.org/> or detroitzoo.org/about/great-lakes-nature-center.

2.3 Objectives

- 2.3.1 Through the feasibility study and campaign planning process, the DZS will:
- Assess the readiness and willingness of individuals, foundations and corporations to support a comprehensive capital campaign
 - Develop reasonable timeframe for meeting the proposed goal
 - Identify DZS's real and perceived strengths, weaknesses and challenges in fundraising
 - Gather feedback on the preliminary Case for Support
 - Begin a process that will inform, educate and cultivate major gift prospects for a potential \$100 million comprehensive capital campaign
 - Determine official roles and responsibilities of DZS Board Members, staff and volunteers in a campaign
 - Identify potential volunteer leadership
- 2.3.2 Potential Participants in feasibility/ planning study:
- Contracted facilitator/consultant with extensive experience in philanthropy (hired via the RFP process)
 - Staff will include the DZS Executive Leadership Team, professional development staff and others as appropriate
 - Volunteers will include several members of the Board, Development Committee, Marketing and Communications Committee, and others with knowledge and experience in development

2.4 Scope of Services

- 2.4.1 Internal Readiness Audit – The selected firm will:
- Assess organizational structure and effectiveness at increasing funding
 - Assess technology and communication capabilities
 - Review giving history and wealth capacity of current and potential prospect pool
 - Assess internal readiness for the acceptance of various planned gift vehicles
 - Identify communication methods and tools that will encourage philanthropic investments, including but not limited to; marketing materials for philanthropic engagement, stewardship communications, additional print materials, video materials and social media assets and efforts
- 2.4.2 Feasibility Study – The selected firm will:
- Assist with the preparation of a preliminary Case for Support
 - Test Case for Support with current and prospective donors and volunteers
 - Test potential campaign goal and set reasonable timeframe for meeting that goal
 - Create campaign gift pyramid
 - Conduct interviews with volunteers, past and present, and donors to assess fundraising capacity and readiness
 - Identify potential lead gifts

- Identify potential volunteer leadership
- Present strategy for reaching new donor prospects

2.5 Capabilities Presentation

A mandatory capabilities presentation will be held at the location and time as indicated in **Section 1, I**, page 1 of this RFP. A more solidified date(s) will be provided in advance of the presentations. This will be your firm’s opportunity to present what you believe is most important for the DZS to know about your firm, and your firm’s approach to conducting a campaign feasibility study. The presentation will also be a time for firms to ask questions. Any oral answers given by the DZS during the capabilities presentation are unofficial, and will not be binding on the DZS. Presentation attendance is at the firm’s own expense.

2.6 Questions

This solicitation is issued by the Detroit Zoological Society. The Purchasing Contact is the only contact for this solicitation. Questions regarding the RFP must be emailed to the Purchasing Contact’s email address indicated in **Section 1, C**, page 1 of this RFP. Questions must be for clarification purposes only. Only questions received by the deadline indicated will receive a response. All correspondence must be in writing. In the event that there is additional information to convey or revisions for the RFP, an addendum or amendment will be emailed to all firms participating in the bid process. The DZS will respond via email; the email will encompass the questions emailed to the DZS and the DZS’s response to those questions. It is the DZS’s policy to share all questions and answers with all firms participating in the competitive bid process. Oral interpretations or clarifications of this RFP must not be relied upon. All changes to this RFP will be in writing and will be emailed to all firms participating in the competitive bid process.

2.7 RFP Interpretation

Interpretation of the wording of this document shall be the responsibility of the Detroit Zoological Society and that interpretation shall be final.

2.8 Insurance Requirements

The firm that receives the bid award for this RFP, and any subcontractor utilized by firm will maintain in force at all times, during the term of a contract with the DZS, insurance of the types customary to the firm’s field of service with minimum coverage levels as indicated below.

TYPE	AMOUNT NOT LESS THAN
Worker’s Compensation/Employer’s Liability	\$500,000.00
Commercial General Liability Insurance (Broad Form Comprehensive)	\$1,000,000.00 per occurrence \$2,000,000.00 aggregate

Automobile Liability Insurance (covering all owned, hired and non-owned vehicles with personal and property protection insurance, including residual liability insurance under Michigan no fault insurance law)	\$1,000,000.00 combined single limit for bodily injury and property damage (for firm's vehicles utilized on DZS grounds)
Professional Liability (Errors & Omission)	\$1,000,000.00 per occurrence

2.8.1 The DZS will be an additional insured on the Commercial General and Automobile Liability insurance policies and the certificate of insurance must be issued by an insurance company acceptable to the DZS on the proper ACORD form, including the following provisions:

- i. The insurer will not cancel or non-renew the insured's coverage without giving thirty (30) days prior written notice to the DZS, and
- ii. The DZS, its officers, agents, employees, and affiliates are included as additional insureds, but only with respect to work performed for the DZS under this Contract.

2.8.2 The firm and any subcontractor agree that the insurance required herein will remain in effect at all times during the Term. In the event said insurance coverage expires at any time or times during the term of this Contract, the firm agrees to provide, at least thirty (30) calendar days before said expiration date, a new certificate of insurance evidencing insurance coverage as provided for herein for not less than the remainder of the Term. New certificates of insurance are subject to the approval of the DZS, and the firm agrees that no work or Services will be performed prior to such approval.

- i. The DZS will not be responsible for any premiums, deductibles, or assessments on any insurance policies required by firm or subcontractor under a Contract.

3. Instructions for Proposal Submission

3.1 Proposal Submission

Proposals may be submitted manually or electronically.

The DZS does not share or divulge offeror's proposals with other offerors. Proposals are reviewed by the DZS selection committee only, which may be comprised of DZS executives, directors, superintendents, managers, board members and DZS legal counsel. Periodically, a subject matter expert is asked to join the selection committee based on the nature of the solicitation. The information will be held in confidence to the extent that the law allows.

3.1.1 Proposals Submitted Electronically. Please refer to **Section 1, D**, page 1 for the method to submit proposals. All proposals received will become the property of the DZS. The electronic version must be an 8 1/2" x 11" document saved as a PDF file. The file name of the PDF shall include only "**The Firm's Name. RFP Name. RFP File Number.**" Offerors are asked to email the file, use Dropbox or Google Drive to share the file, or save the file to a USB drive and enclose it with the manual proposal. If offerors opt to use Dropbox or

Google Drive, please provide instructions for the DZS purchasing contact to retrieve the information.

- 3.1.2 **Proposals Submitted Manually.** All manual proposals must be submitted on 8 ½" x 11" paper, one-sided or double-sided, double-spaced pages. Attach supporting documentation as exhibits whenever necessary. Manual proposals must be submitted in a sealed envelope or other package that allows the documents to be sealed. Proposals received after the deadline indicated in **Section 1, H**, page 1 may not be considered. No waivers or exceptions may be made allowed for untimely deliveries. The DZS will record the date and time, for those bids received by the deadline. The DZS is not responsible for unmarked or improperly marked responses; or for responses delivered to an incorrect location. The DZS is not responsible for any costs the offeror incurs as a result of creating documents in response to, or participating in the DZS competitive bid process.
- 3.1.3 **Withdrawal of Modifications of Proposals.** Any proposal may be withdrawn or modified by a written request signed by the offeror's authorized signer and received by the DZS Purchasing Contact prior to the RFP deadline indicated in **Section 1, H**, page 1.

3.2 Mandatory Submission Requirements

The proposal must include a cover letter on the offeror's official letterhead, with the offeror's name, mailing address, telephone number, fax number, email address and the name of the offeror's authorized signer. The cover letter must include the RFP name and file number, and must be signed by the authorized signer. In addition the cover letter must include the following:

- 3.2.1 Offeror's name as shown on the offeror's income tax return.
- 3.2.2 The appropriate federal tax classification (Individual/sole proprietor, C Corporation, S Corporation, Partnership, Limited Liability Company or other classification identified on the IRS Form W-9).
- 3.2.3 A statement indicating the offeror's acceptance of and willingness to comply with the requirements of the RFP. A statement indicating the offeror's compliance with equal employment regulations and the organization's commitment to diversity and inclusion efforts.
- 3.2.4 A statement indicating the offeror has not hired anyone else, company or firm other than a bona fide employee working solely for the offeror to solicit or secure an Agreement, that may result from the RFP bid award.
- 3.2.5 A statement naming the offeror's personnel(s) responsible for writing the proposal.
- 3.2.6 A statement affirming that the offeror is registered to transact business in the State of Michigan, and that the offeror is not currently suspended, debarred or otherwise excluded from federal or state procurement programs. Please refer to the

<https://www.sam.gov/portal/SAM> website to verify this information using Internet Explorer version of IE11 or higher, or another supported browser type (Chrome, Firefox, Safari, etc.).

- 3.2.7 A statement affirming that the offeror's proposal will remain firm for one hundred twenty (12) calendar days from the proposal's deadline.
- 3.2.8 A statement that the offeror does not willingly or knowingly hire a person who cannot legally working in the United States. The offeror shall confirm that it has taken steps to verify the person's residency status prior to hiring him or her. A breach of contract and a penalty up to 10% of the contract price will apply, per violation, once a contract has been executed.
- 3.2.9 A statement identifying all personal and organization conflicts of interest, with the DZS personnel or affiliates, involving the offeror or its staff, directors, partners, or joint venturers with respect to the services that will be provided, and how the offeror suggests those conflicts of interest can be resolved. If the offeror knows of no such conflicts of interest, then it shall be stated as such. In either case, the offeror will state that it will avoid all such conflicts of interest up to and during the term of a contract.

4. Proposal Format

The instructions below identifies the format and order of information to use when submitting a proposal in response to this solicitation. The format is designed to ensure a complete submission of information for the DZS to evaluate equally and fairly, in an orderly and timely manner. There is no intent to limit the content of a proposal. Offerors are asked to submit proposals in the order defined below.

- 4.1 Table of Contents that identifies the content of each section and the page numbers associated with each section.
- 4.2 Cover Letter. Provide a cover letter that is inclusive of the Mandatory Submission Requirement indicated in **Section 3.2** of this RFP.
- 4.3 References. Provide three (3) references. Be sure to include other zoos, aquariums, museums or similar organizations as a reference. Indicate the contact reference contact's name, company name, phone number, email address, type of services your firm provided and the term of service (e.g., days, weeks, months or years).
- 4.4 Credit Score/Rating. Provide a copy of the offeror's most-recent audited financial statement, or similar document illustrating the offeror's financial stability.
- 4.5 Capability. Identify the name of the person(s) who will be assigned to the DZS account if your firm receives the bid award. Identify the person(s) relevant qualifications and experience by providing brief biographies including titles, functions, academic credentials

and relevant experience for business plan for development services. Include the role of each professional for this assignment, the role of back-up personnel, and how many clients are assigned to each person named above.

- 4.6 Qualifying Questions. Please answer the questions below so that the DZS may have an accurate understanding of your firm's culture, capabilities and services.
- A. How many years has the firm been consulting in development?
 - B. Name and title of individuals who would service our account.
 - C. Are you currently assisting any organizations in our area? If so, list the organization and describe the services you're providing.
 - D. Have you had clients in our area within the last five years? If so, include date of service and type of service provided.
 - E. Please identify the type of clientele, number of institutional clients, and number of years your firm has provided philanthropic counsel, similar to those that the Detroit Zoological Society requires (zoos, museums, parks, cultural attractions, etc.).
 - F. Provide a minimum of three references in connection with feasibility studies and or/ internal readiness audits completed within the last three years.
 - G. Describe your firm's approach to a pre-campaign study. Include timeframes, procedures and personnel resources.
 - H. Describe a typical feasibility study and how your consultants prepare for it.
 - I. How many face-to-face interviews would be required for a campaign of this size?
 - J. What do you believe makes your firm stand out from the competition?
 - K. Please provide a full list of services offered by your firm, including a description of how client servicing/communication responsibilities are handled.
- 4.7 Fee Proposal. Please identify your firm's costs below for the following areas:
- A. Proposed cost to complete the scope of services as described in section 2.5 of this RFP.
 - B. Fee schedule for additional services not included in the firm's fee.
 - C. Is your firm willing to guarantee your fees for a specific period of time?
- 4.8 Other Services. Please identify other services.
- A. Please address any alternative or additional services that your firm is capable of providing, that may be of benefit to the DZS.
 - B. Discuss your experience in rendering such services.

5. Selection Process

- 5.1 The DZS will review proposals and select a firm based on, but not limited to, the following areas:
- Sufficient resources, skill sets and experience to service the DZS
 - Relevant experience with other similar nonprofit organizations
 - Fees
 - Other services
- 5.2 Pre-Award Negotiations. After the proposals are opened, but prior to award, the DZS may elect to conduct oral presentations and negotiations with the offerors that have the highest ranked proposal for purposes of:
- Resolving minor differences and information
 - Clarifying necessary details and responsibilities
 - Emphasizing important issues and points
 - Receiving assurances from respondents
- 5.3 Selection may be made without further discussion, negotiations, and presentations. Therefore, offerors shall propose the most favorable terms in response to this RFP. Offerors must demonstrate an understanding of the scope of services to be provided and the ability to accomplish the tasks set forth. The firm shall include information that will enable the DZS to determine the offeror's overall qualifications. The DZS reserves the right to request additional information or clarification on any matter included in the proposal response, to enable the DZS to arrive at the final award decision.

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