

Request for Proposals Campaign Consultant Salem Athenaeum

Brief Project and Study Overview

The Salem Athenaeum (the “Athenaeum”) is initiating a planning and feasibility project to address the following capital and programmatic improvements:

- universal access, including restrooms
- HVAC for the entire building
- increased staff work space
- increased program space, especially meeting areas and classrooms
- improved storage conditions for the collections, including climate control, shelving, and security
- addition of a warming kitchen

Since 2014, the Athenaeum has completed strategic planning and a member and community user survey. The Trustees have set goals for the project and have established a Planning Committee, comprised of a team of trustees and volunteers, to begin to evaluate how best to approach addressing these needs.

This work positions the Athenaeum to move forward now with a professionally staffed feasibility study. The goal of this feasibility study is to engage consultants to provide technical expertise to evaluate needs and refine alternatives, evaluate fundraising capacity, and establish realistic costs and phasing.

Organizational Background

Incorporated in 1810, the Salem Athenaeum opened the doors of its custom-built iconic building designed by William Rantoul in 1907. Located in the heart of Salem's National Register McIntire District, the Salem Athenaeum's collections of more than 50,000 volumes include historical documents and books that date back to the 17th Century that are important to scholars and researchers from across the United States. The Athenaeum presents approximately 50 cultural programs annually and is also a community gathering place. Each year, the Athenaeum serves more than 2,500 people from Salem, the North Shore, and beyond.

As one of the nation's 15 remaining independent membership libraries, the Salem Athenaeum has served as an important cultural resource for the community for more than two centuries, pre-dating Salem's public library by over 75 years. Today, the Athenaeum is a cultural center hosting lectures, concerts, plays, discussion groups, author and poetry readings, storytelling, workshops for readers and writers, literary social events, and exhibitions drawn from our collections - all open to the public. The Athenaeum began presenting the Salem Literary Festival in 2017. In addition to the important historical research collections that span natural sciences, political and social sciences, theology and travel as well as literature for adults and children, library holdings include a contemporary circulating collection of fiction, non-fiction and children's literature.

The Athenaeum's historic building is located in a highly traveled area of Salem and is open to the public during business hours throughout the year with no admission fee.

Study Goals

The goals of the feasibility study are to evaluate alternatives, draw on experts to create plans which meet the long-term needs of the Athenaeum and its audience, provide realistic cost estimates, evaluate funding options and fundraising capacity, and create a plan which incorporates alternatives and phasing options. Specific tasks include the following.

1. Review existing documentation including Strategic Plan and project goals.
2. Assess the existing library in terms of size, ADA compliance, functional layout, flexibility, and expansion capability.
3. Gain an understanding of any significant architectural and engineering obstacles, i.e. bearing walls that may impede the goal of providing a flexible space.
4. Evaluate the condition of the existing building, including the structural, mechanical, electrical and plumbing systems to determine the upgrades that will be necessary to effectively remodel and/or expand the structure.
5. Gain an understanding of any limitations to the potential for building remodeling or expansion.
6. Assess the Athenaeum's ability to fundraise for different alternatives.

Scope of Work and Deliverables

The Athenaeum is seeking proposals for professional services for the Feasibility Study. Specifically, this request is seeking proposals for a Campaign Consultant.

The following is considered to be the minimum level of effort required. The consultant is encouraged to recommend changes to the Scope of Services that will lead to a more successful project.

The consultant will provide a cost estimate for services for this study.

As part of the final reports from selected consultants, if appropriate, consultant shall indicate key questions which should be addressed in the next phase of planning for the project.

The Athenaeum is seeking proposals for professional services. Specifically, this request is seeking proposals for a Campaign Consultant.

The Campaign Consultant will be responsible for evaluating the Salem Athenaeum's capacity for fundraising in the context of the alternatives and phasing strategies defined by the Planning Committee and will outline a fundraising plan for the campaign. The Consultant will identify grant opportunities and assist in facilitating applications.

The Consultant will report regularly to the PM and, as appropriate, to the Planning Committee.

The Consultant will prepare a section to be included in the final report of the Feasibility Study.

As part of the final report, consultant shall indicate key questions which should be addressed in the next phase of planning for the project.

Timeline

The timeline for this project is September 1, 2018 – December 31, 2019.

Response Requirements

Please describe your professional qualifications, and your approach to the scope. Please include a fee proposal and indicate whether you are proposing a fixed fee or an hourly rate with an amount not to be exceeded.

Provide three references.

Principal Point of Contact

Jean Marie Prociuous
The Salem Athenaeum
337 Essex Street
Salem, MA 01970

Budget

The aggregate of the fees for all disciplines for this feasibility study have been budgeted at \$84,000.

Funding for this study will come from Massachusetts Cultural Council Cultural Facilities Fund, the Salem Athenaeum, and private donations.

Criteria for Selection

Selected proposal will be clearly written and unambiguous, and proposal will comply with response requirements.

Selected proposal will describe measurable results.

Selected proposal will be cost competitive.

Selected consultants will have relevant experience and qualifications.

Selected consultant will describe flexible schedule for availability to meet with other consultants on the project and the Planning Committee.

Format & Proposal Timeline

Proposals will be submitted electronically to work@salematheneum.net, will be in PDF format, and will have supporting documents to include name, title and resume. Proposals will be submitted no later than September 17, 2018.

Attachments:

Mission, goals and objectives for the planning project

Site plan

Photographs