Form A: Signature Affidavit

RFP #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

This form must be returned with your response.

In signing Proposals, we certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise take any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit Proposals, that Proposals have been independently arrived at, without collusion with any other Proposers, competitor or potential competitor; that Proposals have not been knowingly disclosed prior to the opening of Proposals to any other Proposers or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, submitting this Proposals, hereby agrees with all the terms, conditions, and specifications required by the City in this Request for Proposals, declares that the attached Proposals and pricing are in conformity therewith, and attests to the truthfulness of all submissions in response to this solicitation.

Proposers shall provide the information requested below. Include the legal name of the Proposers and signature of the person(s) legally authorized to bind the Proposers to a contract.

Amanda White LLC

COMPANY NAME

Amanda White

SIGNATURE

5/3/2016

DATE

Amanda White

PRINT NAME OF PERSON SIGNING

Form B: Receipt of Forms and Submittal Checklist

RFP #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

This form must be returned with your response.

Proposers hereby acknowledge the receipt and/or submittal of the following forms:

Forms	Initial to Acknowledge SUBMITTAL	Initial to Acknowledge RECEIPT
Description of Services/Commodities	N/A	
Form A: Signature Affidavit	AW	AW
Form B: Receipt of Forms and Submittal Checklist	AW	AW
Form C: Vendor Profile	AW	AW
Form D: Fee Proposal	AW	AW
Form E: References	AW	AW
Appendix A: Standard Terms & Conditions	N/A	
Appendix B: Contract for Purchase of Services	N/A	
Addendum # 1 = Housing Initiatives brochure	AW	
Addendum #2 = Housing Initiatives annual Report	AW	
Addendum #3 = Housing Initiatives newsletter	AW	
Addendum #4 = WPHD brochure	AW	

Amanda White

VENDOR NAME

Amanda White LLC

COMPANY NAME

Form C: Vendor Profile

RFP #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

This form must be returned with your response.

COMPANY INFORMATION

COMPANY NAME (Make sure to use your complete, legal company name.) Amanda White LLC			
FEIN 90-1014864	(If FEIN is not applicable, SSN collected upon award)		
CONTACT NAME (Able to answer questions about proposal.) Amanda White	TITLE Owner		
TELEPHONE NUMBER 608-467-8896	FAX NUMBER none		
EMAIL amanda@amandawhiteconsulting.com			
ADDRESS 1837 Spaight St.	CITY Madison	STATE WI	ZIP 53704

AFFIRMATIVE ACTION CONTACT

The successful Contractor, who employs more than 15 employees and whose aggregate annual business with the City for the calendar year, in which the contract takes effect, is more than twenty-five thousand dollars ($25,000), will be required to comply with the City of Madison Affirmative Action Ordinance, Section 39.02(9) within thirty (30) days of award of contract.

CONTACT NAME	TITLE		
TELEPHONE NUMBER	FAX NUMBER		
EMAIL			
ADDRESS	CITY	STATE	ZIP

ORDERS/BILLING CONTACT

Address where City purchase orders/contracts are to be mailed and person the department contacts concerning orders and billing.

CONTACT NAME Amanda White	TITLE Owner		
TELEPHONE NUMBER 608-467-8896	FAX NUMBER none		
EMAIL amanda@amandawhiteconsulting.com			
ADDRESS 1837 Spaight St.	CITY Madison	STATE WI	ZIP 53704

LOCAL VENDOR STATUS

The City of Madison has adopted a local preference purchasing policy granting a scoring preference to local suppliers. Only suppliers registered as of the bid's due date will receive preference. Learn more and register at the City of Madison website.

CHECK ONLY ONE:

☒ **Yes,** we are a local vendor ***and*** have registered on the City of Madison website under the following category: advertising + promotional materials www.cityofmadison.com/business/localPurchasing

☐ **No,** we are not a local vendor or have not registered.

Form D: Fee Proposal

RFB #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

This form must be returned with your response.

Prepare the fee proposal as all inclusive, not-to-exceed, fixed fees:

- All Inclusive – Covers all direct and indirect necessary expenses including but not limited to; travel, telephone, copying and other out-of-pocket expenses.
- Not To Exceed – The actual fees shall not exceed the amount specified in fee proposal.
- Fixed Fee – All prices, rates, fees and conditions outlined in the proposal shall remain fixed and valid for the entire length of the contract and any/all renewals.

On a separate page please provide:

1. Budget Detail – Provide a total anticipated budget for the project broken down by work component and task.
2. Include billing rates for team members and anticipated expenses.
3. Total estimated hours for each task.

Amanda White LLC

COMPANY NAME

Form E: References

RFP #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

This form must be returned with your response.

REFERENCE #1 – CLIENT INFORMATION

COMPANY NAME: Housing Initiatives	CONTACT NAME: Dean Loumos		
ADDRESS: 1110 Ruskin St.	CITY: Madisin	STATE: WI	ZIP: 53704
TELEPHONE NUMBER: 608-277-8330	FAX NUMBER: —		
EMAIL: dloumos@housinginitiatives.org			
CONTRACT PERIOD: Jan. 2015 - present	YEAR COMPLETED: 1.25	TOTAL COST: $75,000	

DESCRIPTION OF THE PERFORMED WORK: capital campaign preparation + implementation

REFERENCE #2 – CLIENT INFORMATION

COMPANY NAME: ~~We~~ Red Caboose	CONTACT NAME: Wendy Rakower		
ADDRESS: 654 Williamson St.	CITY: Madison	STATE: WI	ZIP: 53703
TELEPHONE NUMBER: 608-256-1566	FAX NUMBER: —		
EMAIL: development@redcabooseDayCare.org			
CONTRACT PERIOD: 2014	YEAR COMPLETED: 2014	TOTAL COST: $13,000	

DESCRIPTION OF THE PERFORMED WORK: Conduct feasibility Study

REFERENCE #3 – CLIENT INFORMATION

COMPANY NAME: Fair Share CSA Coalition	CONTACT NAME: Chris Brockel (past ED)		
ADDRESS: —	CITY: Madison	STATE: WI	ZIP:
TELEPHONE NUMBER:	FAX NUMBER:		
EMAIL: cgbrockel@gmail.com			
CONTRACT PERIOD: 2014	YEAR COMPLETED: 2014	TOTAL COST: 5,000	

DESCRIPTION OF THE PERFORMED WORK: Fund development expansion plan

Amanda White LLC

COMPANY NAME

Form E: References

RFP #: 8525-0-2016-BP Madison Public Market Financial and Fundraising Consultant

REFERENCE #4 – CLIENT INFORMATION			
COMPANY NAME	CONTACT NAME Marsha Rummel		
ADDRESS 1029 Spaight St. #6C	CITY Madison	STATE WI	ZIP 53703
TELEPHONE NUMBER 608-772-4555	FAX NUMBER		
EMAIL marsha.rummel@gmail.com			
CONTRACT PERIOD	YEAR COMPLETED	TOTAL COST	
DESCRIPTION OF THE PERFORMED WORK Marsha has never been a client, but I've worked with her on neighborhood issues for years.			

Amanda White LLC

COMPANY NAME

Amanda White Consulting
1837 Spaight Street
Madison, WI 53704
RFP #: 8525-0-2016-BP
Title: Madison Public Market Financial and Fundraising Consultant
Due: Wednesday, May 4, 2016, 2:00 PM CST

REQUIRED INFORMATION AND CONTENT OF PROPOSALS

Section 3.1 Forms
See attached

Section 3.2 Policy and Procedure Questionnaire
1) List any and all contracts your firm has done for the City of Madison.
None

2) Disclosure of Contract Failures, Litigations
None

Section 3.3 – Project Overview Qualifications

1) Firm/Team
Amanda White Consulting, located on Madison's near east side, was established in 2013 to guide start-up, small, and mid-size non-profit organizations in achieving their greatest potential for fund development success. In three years, Amanda White Consulting has worked with a variety of Madison-based clients including:

- Housing Initiatives
- Fair Share CSA Coalition
- Madison Audubon Society
- Red Caboose Day Care Center
- Sustain Dane
- Wisconsin Alliance for Women's Health
- Zion City International Church Ministries
- WECC
- Wil-Mar Neighborhood Center
- Wisconsin Business Alliance
- Wayfinder Farm Foundation
- WI Partnership for Housing Development

Amanda White Consulting's key areas of focus include:

- capital campaign feasibility studies
- capital campaign planning
- fundraising strategy development
- Board development
- message and brand development (including website, logo, brochure design)
- non-profit strategic planning/work planning

Amanda White Consulting removes the mystery and ambiguity around fund development. At the core, fund development is simply implementing a few key processes and understanding how to foster lasting relationships. While successful fundraising does take time and prioritization, it is not complicated or impossible. Amanda White Consulting makes fund development clear, achievable, and even fun.

2) Team Members

The consulting team is enthusiastic about working on the Madison Public Market. Both Amanda and Carrie have a passion for local, sustainable food systems. They frequently visit various farmers' markets, shop at the Willy St. Coop, have participated in CSA's, and buy local as often as possible.

Amanda White, Project Manager:

Amanda will lead all aspects of the capital campaign preparation project, in addition to conducting most of the work. Amanda will be responsible for all campaign planning development and brand development. Amanda will oversee Carrie Scherpelz's graphic design work and marketing content generation.

With nearly 15 years of experience in start-up small business, non-profit management, and fundraising, Amanda understands how to create a strategy that initiates new funding opportunities. Amanda's diverse background in non-profit management from financial forecasting to media relations to lobbying, enables her to create a fundraising strategy that supports an organization's overall mission and operations.

In addition to Amanda's fundraising knowledge, Amanda's experience in three other areas makes her a strong choice for the public market fundraising and marketing project.

- *Local start-up business development:* Before starting her consulting business, Amanda helped launch Madison's Community Car carsharing service and managed the business for five years, growing the company from 3 vehicles and 20 members to nearly 20 cars and over 1,000 members. One of her primary roles in the start-up phase was recruiting members, raising significant capital for additional cars to build the overall service, and creating all marketing messaging/content. Many similarities exist between the Community Car start-up organization and the launch of the public market.

- *City of Madison and near-east side civic engagement:* Amanda has called Madison's near east side home for over 10 years. For eight years, Amanda was a member of the City of Madison Transit & Parking Commission; originally appointed by Mayor Cieslewicz. During that time, Amanda also served on the Long Range Metro Transit Planning Ad Hoc Committee, the Sustainability Plan Committee, and the Rideshare Company Policy Committee. While managing the Wisconsin Bike Fed's Madison office, Amanda worked with several city leaders to advance bicycling infrastructure. Currently, Amanda is on the Board of Directors for the Marquette Neighborhood Association, is a member of Downtown Madison, Inc., and has a strong relationship with Dane Buy Local. Amanda's local engagement gives her the advantage of understanding how city politics and processes, combined with local giving trends, impact donor relations and gift opportunities.

- *Professional and consumer-based experience in local, sustainable food systems:* One of Amanda's greatest passions is supporting and enjoying local food systems. Having access to an incredible selection of fresh, local, high-quality food is one of the greatest benefits of living in Madison. Amanda has fueled her local food passion by enjoying CSA's through Vermont Valley, frequenting the downtown, east side, and north side farmer's markets, participating in Bike The Barns annually, and engaging with media such as *Omnivore's Dilemma; Animal, Vegetable, Miracle;* and *Food, Inc.* Each year, Amanda takes a stab at gardening and usually gets enough produce to make a few jars of salsa and jam. One of Amanda's first clients was FairShare CSA Coalition, where she learned even more about the local food movement.

Carrie Scherpelz, Graphic Designer:

Carrie is the owner of Design That Gets Results and provides ongoing graphic design support to Amanda White Consulting through a sub-contractor relationship. Carrie has over 30 years of graphic design and marketing communication expertise and has collaborated with clients in Madison and across the country. She has a unique ability to combine words and images to create compelling messages that deliver measurable results. Samples at Scherpelz.com

- *Local start-up marketing:* Carrie has worked with Amanda to create marketing collateral for a number of projects, including Madison's Community Car carsharing service and Housing Initiatives.

- *Marketing Madison and its amenities:* A Madisonian since 1978, Carrie moved to downtown Madison fifteen years ago, and she designed the familiar City of Madison and Madison Children's Museum logos that served the city for almost 20 years before their recent redesign. She created direct mail design for American Girl magazine and launched new brands and products in the American Girl catalog channel. She also developed a successful strategy to rejuvenate the American Girl core brand and implemented a new customer acquisition strategy that increased the prospect catalog response rate significantly.

3) Project examples

- Housing Initiatives (HII) capital campaign and re-branding process (2015 – 2016)
  Initially, Amanda White Consulting was hired to prepare the organization for the launch of a capital campaign. HII is a local organization that provides permanent supportive housing to people with severe mental illness who are homeless because of it. The purpose of the capital campaign is to raise $3,000,000 to purchase several small apartment buildings so HII can offer affordable housing to more people in need.

  Because HII did not have any marketing collateral, Amanda recommended that she lead HII through a re-branding process in addition to preparing a capital campaign plan. Amanda created the $3 million *A Place To Call Home* campaign to end chronic and veteran homelessness.

  Amanda's pre-campaign work included:
  - Re-branding process, including developing a new logo, organization/campaign booklet (included in this packet), new website, updated/expanded Facebook page, new annual report format (included in packet).
  - Messaging strategy creation to be integrated through all new collateral
  - 2015-2016 communication and media plan
  - Capital campaign plan
  - Capital campaign prospect list

  Amanda was then hired for a second contract to implement the campaign plan and raise 75% of the $3 million campaign goal by the end of 2016. Because HII has no fundraising or communication staff, Amanda manages both for HII. Since beginning implementation in June 2015, Amanda and HII have achieved the following milestones:
  - Raised 50% of the $3,000,000 goal
  - Conducted local grant research and created a grant application timeline
  - Increased HII's Facebook fans from 142 to almost 1,000 fans
  - Increased HII's mass email list from 411 to 1,235
  - Doubled HII's annual appeal revenue
  - Executed 3 highly publicized "friend-raiser" events and several house party fundraisers

- Greatly increased HII's media presence including coverage by Madison Magazine, Isthmus, and Neil Heinen's *For The Record*.
- Sent the organization's first mailed newsletter (see attached)

When Amanda started her work with HII, few people in the community were familiar with the organization's important work. This was one of the greatest challenges to a successful campaign. Therefore, Amanda's work has included raising the profile of HII, building key relationships with business and community leaders, and working with the media.

- Wil-Mar Neighborhood Center capital campaign feasibility study (March 2016 – June 2016)
  Amanda was hired to conduct a feasibility study for a capital campaign to test the near east side's potential financial support of a large renovation of the Wil-Mar Neighborhood Center building. Amanda is conducting the feasibility study as an opportunity to not only gain valuable insight into what will motivate east siders to give, but also to promote big program changes at the Center. As part of this extensive feasibility study, Amanda will interview 50 people from all different types of target audiences.

- Wisconsin Partnership for Housing Development (WPHD) fund plan and re-branding process (2015)
  WPHD is a statewide organization that promotes and develops affordable housing projects in communities across Wisconsin. WPHD hired Amanda to develop an annual $100,000 fundraising program for the organization and re-brand WPHD to help support the new fund development efforts. Through this process, Amanda held strategy sessions with both Board and staff to inform the fund development plan. Amanda White Consulting also created a new brand, logo, and beautiful brochure targeted to engaging funders. The new brochure is attached.

- Red Caboose capital campaign feasibility study and preparation (2014)
  Red Caboose launched a new building acquisition committee and capital campaign planning process in 2014. Amanda was hired to conduct a feasibility study for a $2-$3 million capital campaign. Through the feasibility study process, Amanda identified $624,000 in potential gifts, mostly from individuals. A single $500,000 lead gift commitment, secured in part through Amanda's work with Red Caboose, represented the major part of funds raised.

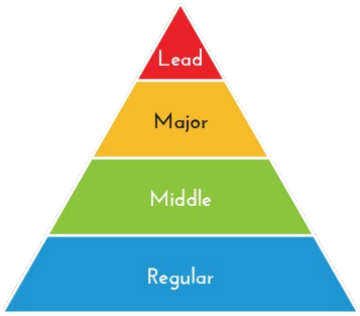
- Fair Share CSA Coalition (2013-2014)
  Fair Share was Amanda's first client. Amanda wrote a fund development expansion plan that built on the organization's current fundraising program. The goal was to create a strategy for increasing individual/major gifts and diversifying revenue streams.

Section 3.4 – Project Specific Qualifications

1) Overall Approach

Successful fund development comes down to one simple idea: people give to people they know and trust. This will hold true for the Madison Public Market. Whether its grant writing, event fundraising, or an appeal letter, success is dependent on strong relationships. Fostering relationships will be the foundation of the consulting team's recommendations and deliverables for the public market.

As the Madison Public Market leadership team embarks on the exciting process of developing and implementing a capital campaign, it's important to proceed with the traditional fundraising pyramid in mind (pictured right). The model is based on the 80/20 rule: 80% of dollars come from 20% or less of the donors, mostly individuals. These are the "lead" donors. It will be important to build a fund development model that connects with potential lead donors, while also establishing a larger base of enthusiastic, smaller-scale donors.



Following this type of model is important for several reasons, the most important being that the capital campaign is not simply about raising the capital dollars. The campaign is an opportunity to lay a strong foundation that will support fundraising success for years after the campaign ends. Donors who give to the public market for the first time through the campaign, have a high likelihood of becoming dependable, annual donors if the campaign is set up with this long-term vision in mind. The campaign could enable the Madison Public Market non-profit to end the start-up phase with a strong base of dedicated donors.

Upon reviewing the Sources & Uses budget provided in the RFP, it appears the leadership team is considering a $2.5 million capital campaign, consisting primarily of $2 million in private foundation gifts. A $2.5 million campaign is fairly modest for the size of the overall Madison Public Market project. With the right Board/Campaign Committee in place and a smart campaign plan, this should be an achievable goal. However, the consulting team assumes that there's been little investigative work to gauge whether there is donor support for the project.

A capital campaign feasibility study is common for organizations embarking on a larger capital campaign or a capital campaign for the first time. A feasibility study helps organizations understand what aspects of the project motivate donors (highly helpful for messaging strategy), identify community members who may be interested in serving on a campaign committee, identify potential larger donors, and understand gift ranges that community members may consider. After a study, organizers have a better sense of whether their campaign goal is realistic.

Amanda added a feasibility study to the list of work plan objectives. Feasibility studies can be simple or extensive running as high as $50,000 to conduct. Amanda has provided a range of $3,000 - $10,000 for a feasibility study depending on the data already collected at public market community meetings and other factors.

After a feasibility study is conducted, Amanda will begin work on a full campaign plan. An initial review of the overall project, outcomes of the study, and Amanda's own campaign knowledge will be the base of the initial campaign strategy. Amanda believes in a collaborative process for determining elements of the campaign plan. With this in mind, Amanda typically organizes and facilitates 3-4 strategy sessions with 4-6 key leaders to brainstorm and make decisions on elements of the campaign. Amanda writes plans that involve a variety of fundraising methods and are implementation-based, enabling organizers to hit the ground running.

Because fund development success is so dependent on relationships, establishing a strong fundraising Board of Directors and/or capital campaign committee is vital to achieving the campaign goal. Often, a successful capital campaign comes down to the leadership that is established. Because the Madison Public Market is in the start-up phase and is in the process of establishing a Board of Directors, this is an excellent opportunity to ensure that the new Board is focused on building a culture of philanthropy from the start. Amanda will guide the leadership team in establishing best practices for Board development that will ensure fundraising leadership.

Overall branding and messaging will be created with two overall goals 1) Engage potential donors 2) Generate enthusiasm and support for the Madison Public Market. Increasing the profile of the Market and educating the public about the project will be two important elements of the campaign. We have the opportunity to frame the Madison Public Market story to gain momentum for the overall project. The story we frame will provide an important marketing base when it's time for the Madison Public Market to be launched.

In summary, Amanda will take a collaborative, implementation-based approach to pre-campaign preparation. This work will be based on the importance of engaging potential donors, creating momentum for the market project, and establishing a strategy for building last relationships that support the Madison Public Market now and into the future.

2) Work Plan -
Amanda proposes to work on Component 2 only and is not proposing any work on campaign implementation within this contract. Operating needs and timeline estimates for implementation can't be accurately made until the campaign planning process is finished.

The following work plan outlines key objectives and a timeline for pre-capital campaign preparation. Until Amanda conducts the public market progress review (Objective 1), it's not possible to outline a specific timeline. There may be slight changes to the scope of work once Amanda learns more in-depth details about the project. Also, the timeline is heavily dependent on availability of the leadership team for strategy meetings and approvals. Therefore, estimates represent a range of possibilities.

Amanda estimates a timeline of 6-9 months for pre-campaign preparation.

- Objective 1: Review all Public Market progress, business plan, meet with leadership, etc. (Month 1)

- Objective 2: Conduct a capital campaign feasibility study (Months 1-3)
    - Determine scope of the feasibility study
    - Generate list of questions and interviewees
    - Conduct interviews
    - Prepare Feasibility Study Report

- Objective 3: Lead Capital Campaign planning process (Months 3-6)
    - Lead three to four, 1.5 hour strategic planning sessions with key leadership
    - Use outcomes/information from Objectives 1-3 to write a comprehensive campaign plan

- Objective 4: Develop the Board/Capital Campaign Committee (Months 5-7)
    - Coach leadership in best practices for developing a fundraising governance board and/or campaign committee.

- Objective 5: Conduct brand development process (Months 5-6)
    - Lead one to two brand development strategy sessions and exercises
    - Create brand identity

- Objective 7: Create messaging strategy (Months 6-7)
    - Frame the public market story and accompanying key points

- Objective 6: Creation of collateral materials (Months 6 – 8)

- Objective 8: Begin prospect list development (Months 6 – 8)

3) Deliverables – Describe the deliverables and outcomes of each Work Component and Task.

- Objective 1: Review all Public Market progress, including the business plan, and meet with leadership.
    - Outcome: Amanda will understand the current state of the public market planning and opportunities/challenges for fund development.

- Objective 2: Conduct a Feasibility Study
    - **Deliverable: Feasibility Study Report**
    - Outcome: Gain a stronger understanding of the public's potential financial support of the public market.
    - Outcome: Understand what aspects of the public market motivate the public to give. This information will be utilized when framing the story and messaging.
    - Outcome: Provide recommendations for best practices in campaign operations and systems.

- Objective 3: Lead Capital Campaign planning process
    - **Deliverable: Lead (and provide agendas for) 3-4 strategy session meetings**
    - **Deliverable: Capital Campaign Plan** (including donor target audiences, goals, objectives, milestones, timeline, budget, revenue goals for each fundraising strategy)
    - Outcome: Provide leadership team with a focused, integrated plan for successfully implementing a capital campaign.

- Objective 4: Develop the Board/Capital Campaign Committee (Months 5-7)
    - **Deliverable: Board development support materials**
    - **Deliverable: 1-2 hour training on Board/Committee development**
    - Coach leadership on best practices for developing a fundraising governance board and/or campaign committee.
    - Outcome: Put public market leadership in the best position to succeed by ensuring a strong process for Board/committee selection and start-up.

- Objective 5: Conduct brand development process (Months 5-6)
    - **Deliverable: Lead one-two brand development strategy sessions and exercises**
    - **Deliverable: Brand guide outlining the brand identity**
    - **Deliverable: Logo graphic**
    - Outcome: A dynamic, engaging brand is created and accompanied with guidelines on how to incorporate the brand strategy (ensure correct logo, color pallet, etc.) to grow consistent community brand recognition.

- Objective 6: Create messaging strategy (Months 6-7)
    - **Deliverable: 1-2 page synopsis of messaging strategy**, including key donor target audiences, an overview of the public market story, key points for donor communication, and a brief elevator pitch
    - Outcome: The leadership team will be able to share the public market story in a way that resonates with potential donors.

- Objective 7: Creation of collateral materials (Months 6 – 8)
    - **Deliverable: campaign brochure** – In the past, it was common for capital campaigns to have a multi-page booklet called a "case for support" that had extensive information about the project, the campaigns, giving levels, etc. The booklets are expensive and often unread by potential donors. The current trend is to instead have a short brochure that provides the case statement and information for the campaign (see the Housing Initiatives brochure attached).
    - **Deliverable: business card(s)** for campaign leaders who are meeting with prospective donors
    - **Deliverable: letterhead/envelopes**
    - **Deliverable: website or website graphics** – Considering the limited information currently available, the consulting team is unsure whether a few graphics and content for a current site is needed, or if a new, minimal campaign website should be created.

- Objective 8: Begin prospect list development (Months 6 – 8)
    - **Deliverable: Template for a prospect list** with 10-15 names already generated.

Section 3.5 Cost

The consulting team's cost estimate is listed in the table below. Because there is uncertainty about whether the leadership team will want to include all work plan objectives, and the specific scope of some of the work objectives is yet to be defined, specific hours of work required for the total project is unclear. Therefore, Amanda has provided a cost estimate range for most of the objectives. In addition, Amanda has provided an additional objective on the cost estimate for consulting in the development of the non-profit organization. This is not included in the total cost estimate, but it's listed in the costs should the leadership team want to take advantage of this service.

While both Amanda and Carrie work on a project basis and not an hourly basis, the hourly rates they use to calculate project costs are: Amanda = $100/hour, Carrie = $75/hour

The cost estimate for the proposed project is $35,500 – $44,500.

Item	**Cost**	**Anticipated # of hours**
Obj. 1: Public Market Review	$1,750	20
Obj. 2: Feasibility Study	$3,000 – 10,000	30 - 100
Obj. 3: Campaign Plan (incl. 3-4 strategy sessions)	$10,000	100
Obj. 4: Board Development (incl. training and support materials)	$2,000	20
Obj. 5: Brand Development (incl. Strategy sessions, logo, guide)	$5,250	60
Obj. 6: Messaging Strategy (incl. synopsis)	$3,500	40
Obj. 7: All Collateral Materials	$5,000 - $10,000	60-90
Obj. 8: Prospect List Development (incl. template)	$2,000	20
TOTAL COSTS	**$32,500-$44,500**	350 – 450 hours
Obj. 9: Consulting on starting a non-profit	$0 - $5,000	

Amanda White

amanda@amandawhiteconsulting.com · 608.467.8896 · amandawhiteconsulting.com · Madison, WI

Experience

Amanda White Consulting, Madison, WI *Founder* *2013 -*

- Plan and lead $3,000,000 capital campaign
- Prepare capital campaign feasibility studies
- Create fund development strategies and plans for implementation
- Provide major donor coaching
- Offer Board development advising

Wisconsin Bike Fed, Madison, WI *Associate Director* *2009 – 2013*

- Secured $10,000 - $100,000 gifts
- Planned and implemented fundraising event that generated $100,000+
- Wrote and managed annual appeals and other fund development programs
- Managed statewide programs and program staff

Community Car, LLC, Madison, WI *Vice President* *2003 – 2008*

- Sold and managed contracts ranging from $12,000 - $200,000+
- Built the company from start-up phase to profitability, alongside the President
- Managed the company's operations and staff
- Projected budget parameters and led the company's financial growth
- Set membership goals and recruited 1,000 members

Wisconsin Association of Lakes, Madison, WI *Development Officer* *2003*

- Managed fundraising efforts
- Led statewide media campaign
- Created direct mail piece

Better Housing for Tompkins County, Ithaca, NY *Development Coordinator* *2001 - 2002*

- Increased total fund raising dollars by 50% over previous years
- Enhanced exposure through fund raising events, a greater media presence, and networking with local business leaders
- Planned and implemented organization's first community fundraising event

Education

University of Northern Iowa, B.A. Communication Arts, focus in Public Relations *2000*

Activities and Honors

2003 – present: Downtown Madison, Inc. member
2013 – present: Association of Fundraising Professionals member
2014 – present: Marquette Neighborhood Association Board of Directors
2010 – 2011: City of Madison Sustainability Plan Rewrite Committee
2007: Wrote a business plan that placed in top 12 out of 400 entries in the Governor's Business Plan Competition
2005 – 2014: City of Madison Transit and Parking Commission
2006: Named as one of Madison's *40 Under 40*

Design that gets results

My Resume

Carrie Scherpelz
533 W. Main #212
Madison, WI 53703
608 233-7787
carrie.scherpelz@gmail.com
www.scherpelz.com

I have over 30 years of graphic design and marketing communication expertise:

Design that gets results. Madison, Wisconsin
Freelance Graphic Designer. 2004–Present

Madison Environmental Group, Inc. Madison, Wisconsin
Director of Communication. 2004–2008
Oversaw company communications; managed marketing plans and designed marketing materials and events for Madison Environmental Group and for its clients; developed marketing strategies which encourage businesses to adopt environmentally sustainable practices that foster change in individuals' behavior.

American Girl, Marketing Communications Division. Madison, Wisconsin
Art Director. 1999–2004
Developed direct mail design for American Girl magazine. Launched a new brand, Girls of Many Lands, in catalog channel. Developed a successful strategy to rejuvenate the American Girl core brand in catalog channel resulting in 8 of 9 pages of products sold out. Designed and managed projects for American Girl core brand in all channels, including retail, catalog, and book marketing. Managed and directed photo shoots. Developed and implemented a new customer acquisition strategy which increased prospect catalog response rate significantly.

Third Floor Design/Third Floor Drama. Madison, Wisconsin
Freelance Writer. 1981-1999
Designed print materials for clients including Earthcare Paper, Fanny Garver Gallery, Madison Children's Museum, Rowe Pottery, The Soap Opera, and Wisconsin Society of Architects. Wrote 5-7 minute long scenes from life. Developed marketing materials; sold sketches to a national audience.

Reed Sendecke Associates. Madison, Wisconsin
Designer. 1980-1981
Provided logo design and design of print materials for clients including City of Madison, Sentry Insurance,TDS and US Cellular, Urban Land Interests, Mercy Hospital, Jackson Clinic, and St. Mary's Hospital.

Madison Newspapers, Inc. Madison, Wisconsin
Design Director. 1978-1980
Created page layout for Wisconsin Regional, a monthly magazine. Hired and directed freelance photographers and illustrators.

The Design Partnership. Evanston, Illinois
Designer. 1975-1978
Collaborated with Bruce Beck, a Chicago 27 designer, to produce print materials for clients such as RandMcNally and S.C. Johnson.