



the sweeney group
consultants to non-profit organizations

PROPOSAL AND AGREEMENT FOR CONSULTING SERVICES

Prepared for

Whitewater Aquatic and Fitness Center

Phase I - Campaign Planning Study

Phase II - Capital Campaign Planning

- Capital Campaign Implementation

- *100 Extraordinary Women*

Revised June 25, 2024

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PROPOSAL AND AGREEMENT FOR SERVICES RE: City of Whitewater Aquatic and Fitness Center

It is a pleasure to present the following Proposal and Agreement for Services to the City of Whitewater City Manager, the Chief of Staff and the Director of Parks, Recreation and Facilities re: the planned renovations and improvements to the municipal pool and fitness center, and to build a maintenance endowment fund and a scholarship fund.

It includes all segments needed for a successful capital campaign to raise the funds needed; a goal range of \$1,500,000 - \$3,000,000 will be tested including repairs and improvements, specific items for naming such as the water slide, spin bikes, etc., a maintenance and program endowment, and a scholarship fund to allow all families in Whitewater to use the facilities.

Phase I

- The **Campaign Planning Study** will confirm the amount of funds that can be raised privately, the campaign timeline, specifics of a public/private partnership with the City, potential donors and volunteers, and to develop campaign strategies including an action plan. As detailed below this will include private interviews and surveys of people throughout Whitewater. The study typically takes 3 – 4 months.

Phase II

- **Campaign Planning** takes what is learned in the study to develop a full campaign. It is easier to recruit community leaders to this short-term planning segment than a full campaign; they usually stay involved in some way. Campaign planning typically takes 2-3 months.

- **Campaign Implementation** – as detailed below, this implements all aspects of the campaign beginning with cornerstone then major gifts, followed by a public phase so that people throughout Whitewater can be involved. This typically takes 12 months; the study report will detail strategies and timeline.

- **100 Extraordinary Women** – this is a trademarked program offered only through the Sweeney Group where a minimum of 100 women are asked to each donate or pledge \$1,000 to name an area in the aquatic and fitness center. This was very successful for the library, raising approximately \$150,000. The concept will be tested during the study. It is anticipated that this could be conducted simultaneously with the campaign planning phase.

I. SPECIFIC AREAS OF CONSULTATION RE: THE CAMPAIGN PLANNING STUDY – PHASE I

NOTE: This is the same process as a feasibility study, but The Sweeney Group uses the term Campaign Planning Study. This asks the community *how* to best position the campaign rather than *if* the City should do a campaign.

A. *Prior* to the interview portion of the study, the Sweeney Group will:

- 1.) draft the information to be used in the study, including working with the City Manager, Chief of Staff, the Director of Parks, Recreation and Facilities, and others to define the case for support and the specifics of funding needed;
- 2.) work with City staff to confirm all policies, e.g. length of pledges and how they will be covered, including if the Whitewater Community Foundation will serve as fiscal agent;

- 3.) determine community volunteers to attend a brainstorming session to finalize the study materials and determine who should be interviewed and to whom a survey should be sent;
- 4.) facilitate a brainstorming session among the City staff and volunteers to:
 - finalize the initial case statement to be used in the study including compelling reasons why this project is important to Whitewater area residents and the future of the community;
 - finalize the questions to be used in all aspects of the study - personal interviews and surveys to be sent to community members;
 - finalize the letter asking representatives of various segments (community leaders, prospective donors and volunteers, prospective members of an Honorary Committee to endorse the campaign, donors known to support Whitewater community projects, etc.) to participate in the study;
 - develop a list of interviewees and survey participants for the study.

B. *During* the interview period, the Sweeney Group will:

- 1.) mail all letters requesting participation to all potential participants;
- 2.) schedule the interviews;
- 3.) conduct a minimum of 15-20 personal interviews of individuals who represent various targeted constituencies, potential donors, and volunteers. NOTE: we ask each interviewee to identify others who should be interviewed; these interviews are done at no additional charge.
- 4.) prepare and mail or email survey questionnaires to all selected individuals, including all members of the City Council and selected City staff so that they can express their opinions confidentially. (It is typical to send surveys to 100 or more individuals);
- 5.) with the City, conduct research on any federal or state public funding available;
- 6.) research any private foundation funding available – local, regional or national.

C. *After* the interview period, the Sweeney Group will present a full written report of the study findings to the City of Whitewater staff, including:

- 1.) summary and analysis of the interviews and surveys;
- 2.) evaluations and recommendations of the potential for a successful campaign and the:
 - image and appeal of the plans to renovate the aquatic and fitness center, how it will impact community services, and the benefits to the Whitewater area, including the economic impact;
 - language for the case statement and campaign materials, based on study participants' responses;
 - the best way to position the public/private partnership between city and private funding;
 - standards of giving chart which details the types of gifts needed to reach the goal at various amounts;

- potential donors, including lead, major gift and possibly challenge grant donors; (This list is included as a separate confidential document.)
- potential volunteers, including campaign leadership to augment the City staff, and those who wish to be involved in the campaign in a variety of roles such as campaign co-chairs, Honorary Committee members, etc. (This list is included as a separate confidential document.)
- whether the *100 Extraordinary Women*™ campaign segment will work again in Whitewater and, if so, potential volunteers;
- whether additional public campaign segments, such as 100 Families, can be used;
- campaign strategy and timeline;
- recommended campaign organization chart;
- public relations and social media activities with timeline.

The report is designed as a complete plan to allow campaign planning and implementation to begin immediately after the study. The report is the property of the City of Whitewater and is typically 25-30 pages in length; it will not be shared without permission.

All activities detailed above will be performed by members of the Sweeney Group, under the direct supervision of Jodi Sweeney. She will conduct all the interviews.

II. SPECIFIC AREA OF CONSULTATION RE: CAMPAIGN PLANNING AND IMPLEMENTATION; *100 Extraordinary Women* – PHASE II

(Note: these deliverables can be funded from campaign proceeds)

The following is a list of services needed for a successful campaign to meet or exceed the private goal determined by the study. The Sweeney Group will provide the following services under this contract:

- Preparation of all strategies identified in the study to be presented as drafts to the City and the volunteers identified in the study for the Campaign Planning Committee for discussion and decision;
- Recommendations regarding campaign policies, such as pledge terms and how the pledges will be covered, escrow fund, recognition opportunities, etc. These will be prepared by the Sweeney Group for review and approval by the City; the policies of the fiscal agent will need to be included;
- Development of a Campaign Planning Committee to strategize the specifics of campaign;
- Conduct approximately 2-3 months of campaign planning to finalize all campaign strategies, recruit additional volunteers and finalize materials; specific roles and responsibilities will be developed;
- Determination of the appropriateness of forming an Honorary Committee for the campaign of influential people from throughout the area. A job description and recruitment strategies will be developed by The Sweeney Group for review and approval by The Campaign Planning Committee and the City;

- Implementation of **100 Extraordinary Women™** if recommended by the study. This is often done at the beginning of the campaign to create excitement and raise funding to be used to implement the campaign.
 - The **100 Extraordinary Women™** component will be launched if it is well received in the study. This is a campaign segment that was developed by The Sweeney Group, which owns the trademark. It has been successful in many communities including Belleville, Watertown, Milton, Evansville, Monroe, and Sparta, and for the Irvin L. Young Memorial Library in Whitewater. It is typically used to launch the campaign. Volunteers ask 100 (or more) women to each pledge \$1,000 (\$200 per year or \$18 per month) and have their names listed in a prominent area of the new pool building. It raises a minimum of \$100,000 and develops a group of committed ambassadors for the project and the campaign. The use of the **100EW** platform is provided without fee, if the City chooses to use it.
www.100extraordinarywomen.com
 - NOTE: **100 Extraordinary Families** uses the same format and is typically used to complete the campaign. This will also be tested during the study.
- Confirmation of the campaign goal, possibly positioned as a challenge from the City to the Whitewater community, and components based on the study findings;
- Determination of cultivation event(s) to inform prospective donors about the design and plans for the renovations and the new building, and the campaign;
- Development of campaign materials based on the issues identified in the study; these materials will include the plan for the recognition of all gifts and naming opportunities for major gifts. The Campaign Planning Committee will have input and the City will approve;
- Development and management of a Campaign Action Plan and Timeline, with responsibilities and a month to month work plan;
- Finalization of the Campaign Organization Chart presented in the study to determine committees needed, timeline for their work and determining segment goals for each;
- Identification of 3-5 visionary/cornerstone donors with strategies to approach them;
- Solicitation of these donors, including development of the talking points, team for the call and strategies. Jodi Sweeney can accompany volunteers on calls, as appropriate;
- Training of volunteers on solicitation of major donors and assistance in solicitation calls as needed. This will be prepared and presented by The Sweeney Group; all volunteers will be asked to participate;
- Strategizing the timing and amount of the major gift requests, including challenge grant(s) for various segments of the campaign. This will be led by The Sweeney Group with the involvement of all parties involved in the campaign;
- Research on additional local, regional and national foundations and public funding; assistance with preparation of proposals;

- Development and implementation of specific elements of the public phase at the appropriate points in the campaign, including planning for collective giving, a paver or tile program, direct mail/social media campaign and special events specifically designed to raise smaller gifts. This will be led by The Sweeney Group with the involvement of all parties involved in the campaign. The timing for this segment will be dependent on the success of the segments above;
- Facilitation of meetings;
- Advice to City staff and volunteers, as requested.

All work detailed above will be performed by Jodi Bender Sweeney, other than administrative and scheduling which is performed by Sweeney Group staff member. All work will be managed and supervised by Jodi Bender Sweeney.

III. REPORTING AND CONFIDENTIALITY

The Sweeney Group will report to the City of Whitewater, with direct reporting to Kevin A. Boehm, Director of Parks, Recreation and Facilities.

The Sweeney Group shall be held harmless against any financial or legal liability arising out of this agreement and related activities provided that the Sweeney Group acts lawfully and in compliance with this proposal.

IV. PERIOD OF CONSULTATION

It is anticipated that the study will begin in September 2024; it should be completed within 90 days of initiation. The study should be completed in 90 days from the date that the contract is signed.

Campaign planning should take approximately 2-3 months and campaign implementation should take 12 months. This timeline will be confirmed by the study. Timing for the *100 Extraordinary Women* component will be determined during the study and approved by the Campaign Planning Committee and the City; it typically launches the campaign. All parties will use due diligence and best efforts to complete the contract within the stated time period.

This Agreement may be canceled by either party upon 14 days written notice and may be modified by written agreement signed by both parties. In the event of cancellation by either party, The Sweeney Group will be promptly paid for time and expenses incurred.

This contract is to be interpreted according to Wisconsin law and all actions related to this contract are to be brought in Dane County Circuit Court.

V. COMPENSATION

Compensation fee shall be:

- \$23,000 for the study;
- \$ 5,000 per month for 14-15 months to conduct all aspects of campaign planning and implementation - \$70,000 - \$75,000.

This timeline will be confirmed by the study; it includes the 100 Extraordinary Women component.

Total fee - \$93,000 - \$98,000 to raise \$1,500,000 – \$3,000,000.

Payment of fees shall be:

50% of the study costs upon signing this contract (\$11,500)

50% of the study fees (\$11,500 plus expenses) upon presentation of the final report.

For campaign planning and implementation, fees and expenses will be invoiced on the 5th of each month, with an invoice sent to Kevin Boehm. Payment is due by the 15th of that month.

Expenses include mileage, at \$.50 per mile. Expenses for hotel and meals will be incurred only if needed. All expenses are billed at direct cost; there is no up-charge on expenses.

Thank you. It is an honor to present this proposal to the City of Whitewater.

If you agree with the terms of this Proposal and Agreement for Services, please sign and return one copy to the Sweeney Group and retain one copy for your files. Please include the requested retainer of 50% of the study portion of the proposal. (\$11,500.00).

I look forward to working with you to assess the potential of raising private funds for a renovated and improved aquatic and fitness center to better serve the entire Whitewater community. It is anticipated that internal planning will begin in August but that any public activities, such as interviews, will be held until the Library campaign is completed in September.

For the City of Whitewater:

 John Weidl
 City Manager
 City of Whitewater

 Kevin A. Boehm
 Director of Parks, Recreation and Facilities
 City of Whitewater

For The Sweeney Group:

 Jodi B. Sweeney
 President

Dated this _____ day of _____, 2024.



REFERENCES

Diane Jaroch
Library Director
Irvin L. Young Memorial Library
431 W Center
Whitewater, WI 53190
262 473-0530
djaroch@whitewater-wi.gov

Jim Winship
Chair, Young Library Capital Campaign
Jim.winship@gmail.com
262 215-1492

Terri Vosters
Community Enrichment and Recreation Director
City of Kaukauna Recreation Department
207 Reaume Ave
Kaukauna WI 54130
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Aural Umhoefer
Former Board Member, Campaign Committee Al. Ringling Theatre
Retired Dean, University of Wisconsin Baraboo/Sauk County
Secretary, University of Wisconsin Baraboo/Sauk County Foundation
700 Effinger Road
Baraboo, WI 53913
608 356-2318
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Additional reference available on request.

Jodi Bender Sweeney
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Management Experience

President

The Sweeney Group

Madison, WI

1991 - present

Independent consultant serving not-for-profit organizations throughout the country, with emphasis on libraries, historic preservation, health care and public school foundations. Areas of expertise include all aspects of resource development: capital campaign planning and implementation, feasibility and campaign planning studies, retreats for Boards of Directors and staff, and development of annual campaign plans. The Sweeney Group most often works with not-for-profit organizations that are conducting their first capital campaign.

President and Founder

100 Extraordinary Women

www.100extraordinarywomen.com

Madison, WI

2010 - present

On-line and in-person fund raising tool that teaches women how to raise \$100,000 within 6 months for a specific project or non-profit organization. This is a unique program that has specific tasks to bring a minimum of women together with gifts and 5 year pledges of \$1,000 each. Details are on the website.

President

Foundation for Madison's Public Schools

Madison, WI

2000 - 2006

Researched and developed this non-profit organization that raises funds for creative and innovative projects in the Madison Metropolitan School District; became the first President at the request of the founding committee; within first year raised approximately \$900,000 which was 3-5 years ahead of projections. The total raised to date is \$6 million and innovative, award-winning programs have been developed. Reported to the Board of Directors - responsible for all aspects of the organization.

Executive Director

The Capital Fund Raising Committee

Madison, WI

1987-1998

Under the auspices of the Chamber of Commerce, the committee is comprised of corporate Chief Executive Officers. Reviewed capital campaign plans for not-for-profit organizations throughout the community, provided technical assistance, and scheduled campaigns to avoid competition; prepared quarterly newsletter.

Program Officer

Madison Community Foundation

Madison, WI

1981 - 1991

First person in this position; worked under Ford Foundation grant to develop "Project Opportunity" and develop partnerships; developed initial grant-making program plan and guidelines.

Senior Consultant

Alford, Vershave, and Associates

Chicago, IL and Madison, WI

1978 - 1981

Full Service Resource Development Consulting Firm

Developed and managed Wisconsin office

Manager, Community Relations

GATX Corporation

Chicago, IL

1976-1978

At the request of the Chief Executive Officer, chaired Contributions Committee

Developed Matching Gifts and Employee Volunteerism programs

Provided volunteer technical assistance to numerous not-for-profit organizations in the Chicago area

Assistant Corporate Secretary

GATX Corporation

Chicago, IL

1975-1976

Prepared information for shareholders; managed the annual meeting

Paralegal

Kirkland and Ellis

Chicago, IL

1974-1975

Performed a variety of paralegal duties on anti-trust litigation

Education

Marquette University

B.A. Degree 1974

Major in Political Science; minor in Economics

Lake Forest College
Post-graduate coursework in business and non-profit management
1974-1976

Affiliations

National Trust for Historic Preservation
Member, National Advisory Board
Elected 2010

National School Foundation Association
Founding Member, Steering Committee
Member, National Conference Planning Committee

National Society of Fund-Raising Executives (currently Association of Fundraising Professionals)
Founding member and Past Vice President
Madison, WI chapter

Society of Non-Profit Organizations
Assisted in the development of *TeamTrack*, national non-profit management series presented via distance education format

Wisconsin State Association of Non-Profits
Founding Steering Committee member

Junior League of Madison, WI
Founding Member

United Way of Dane County
Past member, Allocations Committee

Blackhawk Council of Girl Scouts
Past member, Board of Directors

Susan G. Komen Breast Cancer Research Foundation
Member, Board of Directors of Madison affiliate

Articles

"Are you Ready for a Capital Campaign?"
Fundraising Forum
Nonprofit World Magazine

"Venture Capital for Kids"
Prospectus – Support for National Movement of Local Education Foundations
Presented at meeting of education foundation executives and volunteers

