



Resource Development Consulting Proposal

Presented to

**City of Whitewater
Aquatic and Fitness Center**

**Nancy Seidl Nelson, CFRE
SPI Consulting, LLC**

June 21, 2024

Introduction

SPI Consulting, LLC resubmits this proposal after outreach from Kevin Boehm of the City of Whitewater. This proposal is based on a request in 2023 for a Campaign Planning Study to test the strategies, elements and goals for a fundraising campaign for the Whitewater Aquatic and Fitness Center (WAFC).

A feasibility study is a dress rehearsal of sorts for a fundraising campaign. While campaign goals are often built on needs, the data collected through a study provides guidance and feedback as to whether the initial plans are on track and what methods, messaging and volunteers will best lead you to success.

By utilizing professional counsel, WAFC will have a neutral party interviewing the constituents identified, often those closest to your service and mission. This is a key element of success in a feasibility study because those interviewed are more likely to be forthright and honest to an individual who is not directly affiliated with your organization.

Services Provided

The study will consist of gathering planning data already in place from WAFC and developing a concise case statement about the project. A questionnaire will then be developed that will address the following areas:

- Awareness and involvement with WAFC
- Familiarity of current programs
- Reputation
- Campaign Case, Timing and Gift Levels
- Estimation of goal
- Identification of potential volunteer leadership
- Potential major donors
- Possible challenges to success/external factors
- Public/Private partnerships

A Feasibility Study Task Force will be engaged to lead this effort. The study task force should consist of three-five individuals and include representation from both the City and the WAFC Friends. This group will be essential in identifying key elements for the study and support the development of the interview list.

Deliverables

Upon completion of the study, results will be analyzed and a summary of finding will be presented to leadership and the Feasibility Study Task Force. In addition to the data summary from the interviews, this report will also address any issues identified that may need to be addressed before moving toward a campaign. From this summary, recommendations and conclusions will be shared to inform and guide the next steps of the process.

It is important to note that all of the study participants will be ensured that their individual responses are confidential and all questionnaires remain the property of SPI Consulting upon conclusion of the study.

Project Timeline

The entire Campaign Plan Study process would take approximately 90 days to complete. Timelines are always dependent on each side meeting its obligations in providing data, arranging meetings and execution. The project could begin in September 2023.

A general guideline for this project of this type would be:

September 2024

- Discovery Meetings with City Officials, Aquatic Center Staff and Friends of WAFC representatives. Tour of facility and detailed understanding of project elements, external concerns or challenges and approximate costs.
- Identify and recruit Task Force members
- Review of data and materials to begin development of case statement elements and questionnaire(s)
- Task Force meeting to review process, discuss case and begin identification of interview subjects. Goal would be to complete a minimum of 40 interviews; need minimum of 60 potential participants identified.
- Determination of secondary group for surveys
- Questionnaire Development and Review

October 2024

- Scheduling and execution of interviews – target to complete 40 interviews
- Updates on progress to Feasibility Study Task Force – potential enlistment if scheduling of interviews proves difficult

November 2024

- Analysis of data gathered to date; continued interviews to reach our target
- Development and execution of online survey to secondary audience with limited window to respond

December 2024

- Development of report with findings and recommendations
- Summary presentation to City and WAFC leadership and Task Force

Assessment Responsibilities

City of Whitewater:

- Availability for Discovery meeting and supporting project by providing access to and including the right stakeholders
- Provide data, reports and other materials to support the proposed needs and desired elements for capital campaign
- Be responsive to requests for additional data or success stories to support case statement development
- Assist with the selection of individuals to serve on Task Force
- Coordinate Task Force meetings
- Assist with the selection of individuals to be interviewed as part of the study
- Assist with scheduling of individuals for interviews
- Provide space for in-person interviews
- Maximize time consultant is on-site
- Support project timeline with timely responses

SPI Consulting, LLC:

- Conduct discovery meeting to outline steps, define clear objectives and determine stakeholders
- Thorough review of requested data, reports and documents
- Professional representation on behalf of WAFC with task force members and identified interview subjects
- Creation of case document
- Creation of study questionnaire for both personal interviews and online survey tool
- Maintain master schedule of interviews
- Regular updates to task force
- Analyze interview responses and develop recommendations
- Present report on study findings and recommendations for future steps

Project Budget

SPI Consulting's professional service fee for this process would be \$20,000. The fee will be paid over the service timeframe at billed at the end of each month of service.

Payment Schedule	Amount
Upon Executed Contract	\$2,500
October 15, 2023	\$7,500
November 15, 2023	\$5,000
December 15, 2023	\$5,000

SPI Consulting is pleased to have the opportunity to present this proposal and advance the planning process for the Whitewater Aquatic and Fitness Center. This proposal is valid for 30 days.

Attachment:
Bio and References

NANCY SEIDL NELSON, MBA, CFRE

**Nonprofit Leader and Development Professional
Principal Consultant and Owner, SPI Consulting, LLC**



Nancy Seidl Nelson, CFRE is an accomplished, local development professional with expertise in fund development, nonprofit leadership and communications. A strategic and mission-driven professional, Nancy has the innate ability to unite people around a vision and transform it into reality.

Nancy is a Certified Fund Raising Executive who has raised millions of dollars throughout her career. Nancy's experience encompasses all elements of development, including capital campaign efforts ranging from \$2 million - \$250 million dollars, major and planned giving, annual giving, operations and administration. Her experience as a nonprofit leader also includes working with Boards of Directors and volunteer fundraising committees. Nancy's breadth of experience as a team member and consultant includes nonprofits representing health care, human services (both faith-based and secular), membership associations, higher education and arts and culture throughout southeastern Wisconsin, including:

- Children's Hospital Foundation
- Marquette University
- The Abbey Group (Consulting Firm)
- Catholic Charities of the Archdiocese of Milwaukee
- ProHealth Care Foundation

Drawing on this myriad experience, Nancy started SPI Consulting in 2017 with a clear focus on what matters: Strategy, Purpose and Impact. SPI Clients include:

- Montessori School of Waukesha
- Food Pantry of Waukesha County
- Humane Animal Welfare Society
- Forward Community Investments
- College Possible
- Thriving Waukesha County Alliance
- Variety- the Children's Charity of Wisconsin
- Falls Area Food Pantry
- Citizens Utility Board
- Hope Network for Women
- Variety – the Children's Charity of Wisconsin
- Bel Canto Chorus
- NAMI – Wisconsin Southeast

A graduate of the University of Wisconsin, Madison, Nancy is a member and former board member of the Association of Fundraising Professionals Southeastern Wisconsin chapter. She is also President of the Board of Directors of TEMPO-Waukesha and adjunct professor at the Lubar School of Business at UW – Milwaukee.

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