the sweeney group
consultants to non-profit organizations

PROPOSAL AND AGREEMENT FOR CONSULTING SERVICES

Prepared for

Whitewater Aquatic and Fitness Center

- **Capital Campaign Planning**
- **Campaign Implementation**

Phase II
August 1, 2026

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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 and the Director of Parks, Recreation and Facilities re: raising the funds needed for the planned renovations and improvements to the municipal pool and fitness center, and to build an endowment fund.

I. OVERVIEW

This agreement follows the initial campaign planning work to prepare strategies and materials that was done in May, June, and July 2026. We now have a Campaign Planning Committee in place and need to proceed with final planning and full implementation of the campaign, the corresponding community education component, and the 100 Extraordinary Women segment. NOTE: The fee for the use of the *100EW* platform will be waived by Jodi Sweeney. www.100extraordinarywomen.com.

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

The following is a list of deliverables needed for a successful campaign to meet or exceed the private goal of a minimum of $1,500,000, and to develop the talking points and materials to approach the City for an additional $1,500,000. The Sweeney Group will provide the following services under this contract:

- Determine the best strategies and timing to approach the City of whitewater for a financial commitment of $1,500,000 for the project. Ideally, this would be positioned as a challenge grant to people and organizations across the area to raise the additional $1,500,000 as a match;

- Finalize the agreement with the Whitewater Community Foundation (WWCF) to serve as fiscal agent and hold the endowment fund;

- Develop a Campaign Planning Committee to strategize the specifics of the campaign – facilitate all meetings of the committee;

- Prepare all strategies identified in the study to be presented to the Campaign Planning Committee for discussion and decision;

- Prepare recommendations regarding campaign policies, such as campaign goal, pledge terms and now the pledges will be covered, recognition opportunities, etc. These will be prepared by the Sweeney Group for review and approval by the City. The WWCF's policies will be included;

- Develop and manage the Campaign Action Plan and Timeline, with responsibilities and a month to month work plan;

- Develop 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, coordinated with the recognition from the SWIM campaign. The Campaign Planning Committee will have input and the City will approve;

- Form an Honorary Committee of influential people from throughout the area who endorse the project and the campaign. Roles and responsibilities and recruitment strategies will be developed by The Sweeney Group for review and approval by The Campaign Planning Committee;

- Implement ***100 Extraordinary Women*** as a campaign segment at a time to be determined by the Campaign Planning Committee. This is often done at the beginning of the campaign to create excitement and raise funding to be used to implement the campaign. www.100extraordinarywomen.com
  NOTE: ***100 Extraordinary Families*** uses the same format and is typically used to complete the campaign;

- Develop and implement a community education component to market the facility and the campaign;

- Determine cultivation event(s) to inform prospective donors about the design and plans for the renovations and the new building, and the campaign;

- Finalize the Campaign Organization Chart presented in the study to determine committees needed, timeline for their work and determining segment goals for each;

- Identify 3-5 visionary/cornerstone donors with strategies to approach them;

- Solicit these donors, including development of the talking points, team for the call and strategies. Jodi Sweeney can accompany volunteers on calls, as appropriate;

- Train 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;

- Strategize the timing and amount of the major gift requests, including challenge grant(s) for various segments of the campaign. Solicit these donors by category. This will be led by The Sweeney Group with the involvement of all parties involved in the campaign;

- Research additional local, regional and national foundations and public funding; assistance with preparation of proposals;

- Develop and implement 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. (see note re: 100 Extraordinary Families, above.) 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 this phase of campaign planning and implementation will begin on August 1 2026 and last for 10 months.

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.

Neither party may assign this contract without written consent of the other party.

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

Campaign fees will be $5,000 per month for 10 months to conduct the aspects of campaign planning and implementation identified above. This is a total of $50,000 in fees to raise $1,500,000.

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

Fees and expenses will be invoiced by the 5th of each month; invoices will be sent to Kevin Boehm. Payment is due by the 15th of that month.

If you agree with the terms of this Proposal and Agreement for Services, please sign and return one copy to the Sweeney Group with a retainer of $5,000, which is the August fee. Please retain one copy for your files.

Thank you.

For the City of Whitewater:

_____	_____
John Weidl	Kevin A. Boehm
City Manager	Director of Parks, Recreation and Facilities
City of Whitewater	City of Whitewater

For The Sweeney Group:

_____
Jodi B. Sweeney
President

Dated this _____ day of _____, 2026.