

Request for Proposal

Introduction:

The St. Augustine Lighthouse & Museum, Inc. and the Lighthouse “discover, preserve, present and keep alive the story of the Nation’s Oldest Port, as symbolized by our working lighthouse.” We tell the multi-cultural, maritime story of our nation’s oldest continually occupied coastal city. St. Augustine and St. Johns County are situated near the sea along three coastal estuaries. Development of the nation’s oldest city depended on the sea and maritime landscape for survival.

The St. Augustine Lighthouse and Museum, Inc., a not-for-profit 501 (c) 3, has been called, “the finest of its kind in the nation,” by Stephen Perry, former Secretary for the General Services Administration. In 2002, St. Augustine was the first lighthouse transferred from the USCG through the GSA and National Park Service into non-profit ownership under the National Historic Lighthouse Preservation Act of 2000. The organization has worked as a model to help other lighthouses across the United States ever since.

The museum strives to keep alive the story of the nation’s oldest port, the lighthouse and its associated maritime heritage through research, historic interpretations, education and community service. We use maritime activities to build self-esteem in young people and to offer new career choices in the humanities and marine sciences. We continue to preserve the St. Augustine Light Station, which has been an aid-to-navigation since the 16th century, here on Anastasia Island and has played witness to Spanish, British, and American governments, armed conflicts and times of peace, growth and prosperity. We save the maritime cultural heritage of our local area by sharing the local stories of shrimping, fishing, boat building and the vast array of cultures that have lived tied to the sea and to this area’s estuaries.

The St. Augustine Lighthouse and Museum is an historic site that has traditionally operated on heritage tourism dollars. We have a staff of 30-37 that rises and falls seasonally and a board of 15 members, four of which have ties to the Junior Service League. Over 190,000 visitors annually come to our site to enjoy the beautiful views and to discover more about our nation’s oldest continually occupied port city. Our research arm, the Lighthouse Archaeological Maritime Program or (LAMP) performs maritime archaeology in a state-designated underwater preserve off shore. Some 54,000 of our visitors are children.

- We are currently engaged in building a replica of the Ship *Galveztown* with a museum and boatyard in Malaga Spain.
- We have a successful volunteer boat-building program on site.

- We advocate for the preservation of other lighthouses in Florida and nationwide.
- We are telling the rich story of how the Florida Seafood industry and shrimping came to exist through the efforts of St. Augustine Families still living in our area. This rich Greek, Italian and African American story changed America's foodways.
- We are performing archival research in Spain and maritime archaeology under the waves in St. Augustine through LAMP, our research arm.
- We are putting talented high school students in the water with archaeologists to introduce maritime humanities and marine sciences.
- We are working with interns and field schools from a variety of universities.
- We are building a maritime library for use by students and scholars.
- We are famous as the most haunted Lighthouse in America and have been featured on the Discovery Channel, Ghost Hunters, and many other national programs.
- We provide summer camp experiences to at risk elementary age students in partnership with the Sertoma Club and other donors.
- We provide in excess of \$180,000 worth of free passes and services to the military, local firefighters and policemen, social service organizations and local businesses annually.
- We are part of a community group hoping to study the feasibility of having the Nation's Oldest Port City designated for the significance of its coastal and maritime heritage. St. Augustine is a city that is inextricably tied to the sea.

Situation

The SAL&M was established in 1998 and LAMP followed in 1999. However the site first operated as a museum operated by our parent organization, the Junior Service League of St. Augustine, who restored a burned out keepers' house and opened a museum here in 1988.

The Board of the SAL&M plans to construct an archaeological laboratory, office space for archaeologists, a modest research library and an indoor space for exhibits and children's education on site. An architect has been hired to do initial drawings and space design.

A previous feasibility study in 2001 revealed that some residents thought of the site as more of a tourist attraction than a community service organization. We have worked to

correct that impression since the first study by revealing more of what we do to the public and growing our public service. The museum has not been involved in a capital campaign, since its parent organization funded a \$1.25 million dollar restoration of the lighthouse tower between 1980 and 1995. However, it has attracted several awards and accolades for its work across the state and nation in lighthouse advocacy, and it has made in excess of \$20 million dollars in earned income since opening to the public full time in 1994. It has also attracted approximately \$2,175,500 in state, federal and foundation grants during this time.

The Board of Directors has set a goal to fund our new building through capital campaign donations and to broaden the understanding of our site as a community service organization and a national treasure. They also hope to add \$1 million to our small, but growing endowment and to raise enough money to fund the campaign and fund operations of the new structure.

The Board would like to test a \$5-6 million dollar campaign in order to build our building, grow our endowment and plan for campaign and operating overhead. A final, draft budget is being developed now along with a case for support document.

Tasks to be accomplished

A **readiness assessment** will determine the likelihood for success in a capital campaign and discover areas that might need improvement prior to launching a campaign. A **feasibility study** is an objective survey, usually conducted by fundraising counsel, of an organization's fundraising potential. The study assesses the strength of the organization's case and the availability of its leaders, workers, and prospective donors. The written report includes the study findings, conclusions, and recommendations. (*Source: AFP Dictionary*)

We are seeking a consultant to determine readiness and/or feasibility of our campaign with the following deliverables:

Readiness Phase:

- Identify campaign needs:
 - Define the role of campaign counsel as you propose it.
 - Define the operational process of the proposed campaign.
 - Provide draft/proposed job descriptions for campaign counsel and museum staff and board members during the campaign.
- Target a preliminary dollar-range goal for testing.
- Review institutional readiness to enter a capital campaign including initial assessments of staff capacity and board readiness.

- Specify time-line for the campaign.
- Specifically define the process of making the ask, who is the preferred party to make the ask and indicate the role you will play in this process as a consultant.
- Articulate the requirements for campaign leadership both volunteer and on staff.
- Review extant materials provided to you including budget and case for support documents. Outline suggested steps needed to solidify our budget, plans and case for support.
- Present an interim written report at the end of the readiness phase.

Feasibility Phase:

- Individual interviews of a minimum of 40 key constituents to test the assumptions of our preliminary case and identify campaign leadership and significant gifts. We expect many of these to be conducted face to face.
- Develop and present a case for support document to the key constituents for discussion.
- Identify any impediments to reaching our goal.
- Make suggestions about a campaign marketing and timing strategy.
- Prepare a Critical Path Management Schedule (timeline) for campaign activities.
- Present a final written report at end of the feasibility phase.

Budget and time frame

The Museum has set aside a limited sum for this first round of feasibility study and readiness proposal. We anticipate hiring for the work in the mid-40s. In submitting your proposal, we ask that you keep our budget restraints in mind. We invite you to select the best options from the suggested deliverables above in order to perform the tasks with the budget available.

We would like to complete the readiness and feasibility portions of the work as quickly as possible during our fiscal year, which starts July 1, 2008 and runs until June 30, 2009.

How to submit a proposal

Interested parties should submit the following in writing by mail or email, no later than August 10, 2008 to Kathy Fleming, Executive Director, St. Augustine, Lighthouse and Museum, Inc. 81 Lighthouse Avenue, St. Augustine, FL 32080 (904) 829-0745, ext 215. If there are questions, call Kathy at 904 829-0745, Ext 215. Or email at kfleming@staugustinelighthouse.com.

Please submit the following:

1. A brief proposal describing
 - A. Your firm's qualifications (or the qualifications of the team of consultants)
 - B. Methodology. If you choose to re-organize the tasks, explain why and how you are organizing the work in the manner suggested.
 - C. An estimate of fees to be charged in full.
 - D. Resumes of all consultants who would be involved in the project.
 - E. Names, phone numbers of at least five references who have been your clients during the last 18 months, whom we can call upon to discuss your work.

Face-to-face interviews with finalists will be held at a time and date pre-determined by the Development Committee of the Board of Directors of the St. Augustine Lighthouse and Museum. Your firm must present in person in order to be considered as a consultant. Notice of at least three weeks will be provided in advance of the scheduled presentation date. Your presentation should not last longer than one hour.

Presentations of slides or power points during these face-to-face interviews are encouraged. A staff member will contact you about your audiovisual needs if any in advance.

- Each firm will have a limit of **one hour** for presentation and questions
- A minimum of three (3) firms will be invited to present.
- Notification of hire will follow within 30 days of presentations.
- A maximum of two (2) consultants from your firm may present at the presentation.

Requirements and Technical Specifications

The St. Augustine Lighthouse and Museum, Inc. reserves the right to change and adjust any portion of this RFP as it meets our needs. Payment for services engaged will be by written contract, pre-approved by our Executive Director and Development Committee. We will pay within 30 days of completion of the phases. We must receive a written bill

for each portion of the work from you. The 30 days begins on the day of receipt of the bill.

Fundraising license in the State of Florida must be in place by all bidders.

All firms must have liability insurance that will cover their travel and other associated issues.

Knowledge of best practices in the field is required.

Museum experience or experience in the non-profit world, preferably with cultural resource management organizations, is encouraged.

Knowledge of the donor bill of rights and adherence to strict ethical standards is strongly preferred.

All materials presented by the museum during the bidding or contract process will be kept strictly confidential.

All materials owned by the museum remain the property of the museum. All final work products including photographs, artwork, written materials or media materials, etc. will be the property of the St. Augustine Lighthouse & Museum, Inc.

Method of Payment will be by check from the St. Augustine Lighthouse and Museum, Inc. One-third will be issued as a retainer, one-third at the end of the readiness phase and final third at the end of the feasibility phase.

Proposals may indicate a desire to perform feasibility and readiness sections separately or to reorganize the work into a different format. Any changes to the proposed scope of work should be made in writing and agreed to by signature of both parties.

Only the Executive Director of the museum or the Board Chairperson is authorized to sign for the museum. The Executive Director will be your main point of contact.

Attachments

Please contact Mollie Malloy at mmalloy@staugustinelighthouse.com or 904-829-0745 ext. 220 for the following attachments:

- Capital Campaign Plan
 - Includes *Draft* Case for Support and *Draft* Campaign Budget
- Organization Financials
- Selected Press Releases and Newsletters