



# EVANSVILLE PARK IMPROVEMENTS

## DESIGN OF AQUATIC & PARK FACILITIES

PROPOSAL FOR ENGINEERING, LANDSCAPE ARCHITECTURE,  
& FUNDRAISING SERVICES

**PREPARED FOR**

**CITY OF EVANSVILLE**

3/22/2021

March 22, 2021

Jason Sergeant, Community Development Director  
City of Evansville  
31 S Madison Street  
PO Box 529  
Evansville, WI 53536

**SUBJECT: EVANSVILLE PARK IMPROVEMENTS - DESIGN OF AQUATIC CENTER & ATHLETIC FIELD FACILITIES**

Dear Jason Sergeant and review committee:

Imagine the sound of children laughing with joy, the smell of food grilling at the concession stand, and the lights overhead flooding the fields while friends and family gather. This is the vision the City of Evansville has been working so hard to provide for its citizens, and now is the time to take the conceptual work and turn it into reality.

It is with great pleasure and enthusiasm that Ramaker, Snyder & Associates, and McDonald Schaefer present the following proposal for professional design services for the development of West Side and Leonard-Leota Parks. Our process as designers of built space is based on our ability to ask questions, comprehend users' requests, and apply their ideas to a site. As designers and fundraisers, we believe the most important component of project success is our **engagement** with the community and our ability to **ask, learn, and apply**.

The assembled team for this project was formed to create built work that successfully reflects the community and users of both parks. Further, this team was created based on our individual strengths and past working relationships. We're here, as one team, because we excel in the following:

**Ramaker:** Aquatic designs that inspire, engage, and challenge our creative endeavors to ensure built work is unique and timeless.

**Snyder & Associates:** Public engagement and park master planning that serves as the backbone for construction documents that unite ideas and collaboration that result in stunning build space.

**McDonald Schaefer:** Delivery of reality in the form of fundraising and securing available funds to take projects from idea to financial possibility.

Most important to the project and our commitment to the City of Evansville is our hard work and passion that revolves around public space. Although our team is made up of a diversity of individuals and passionate designers, our goal is the same: **lead a team that can deliver built public space and enjoyment for several decades for the residents and visitors of Evansville.**

We're excited to submit this proposal and would welcome the opportunity to contribute to the future success of the City of Evansville. Our team is ready to enter this partnership with you and take the conceptual work from visions to reality.



Daryl Matzke, PE  
Aquatics Market Leader



Andy Meessmann, PLA  
Landscape Architect

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**01**

**PROJECT OVERVIEW**



# PROJECT OVERVIEW

In November 2020, the City of Evansville residents presented favorable support for development of the 24-acre West Side Park and construction of a new Aquatic Center along with improvements to the existing Leonard-Leota Park. The proposed Park improvements represent a positive quality of life investment for current and future generations of Evansville residents.

Neighborhoods will grow and prosper with the addition of multiple athletic fields and a new Aquatic Center at the West Side Park. Proposed pedestrian ways, public shelters, concessions, and community gardens will provide opportunities for friends and family to gather and play, or just relax and enjoy being outdoors.

Demolition of the existing pool and bathhouse will provide an opportunity to enhance the natural environment and recreational features at the historic Leonard-Leota Park. The proposed Splash Pad will add a dash of fun to an already beautiful setting. The lake, the stream, and rolling landscape with old growth trees will continue to benefit the wellness of your community.

Based on conceptual designs and cost opinions developed in 2018 and 2019 and updated in 2020 for these facilities, the City desires to hire a qualified Consultant to lead the project from design through construction with services summarized as follows:

- Engage the public during Schematic Design to combine and refine previous master plans.
- Confirm construction estimates.
- Assist in development of a fundraising plan and/or grant applications.
- Proceed with Design Development.
- Complete technical design and engineering.
- Develop construction plans and specifications.
- Obtain regulatory agency approval.
- Prepare bid documents.
- Provide construction administration services.
- Assist in review and resolution of construction warranty matters

A photograph of a football field at sunset. The sky is a mix of orange, pink, and blue. In the foreground, the green grass of the field is marked with white yard lines. Several players in white jerseys and black pants are visible on the field, some standing and some in motion. A coach or staff member in a dark jacket and khaki pants is standing on the right side of the field, looking towards the players. The overall scene is a typical football game in progress during the "golden hour" of sunset.

02

ABOUT RAMAKER,  
SNYDER, & MCDONALD  
SCHAEFER

# / Our Team



Our Team - Ramaker & Associates, Inc. (Ramaker), Snyder & Associates, Inc. (Snyder), and McDonald Schaefer - appreciates the opportunity to submit a proposal for these services. Together we will address this project as single entity as presented in the Request for Proposal. With you – the City – we will rise to the challenge of addressing this project within the desired 24-month time frame and the total \$10.9 million budget.

In response to the questions outlined in the RFP provided by the City of Evansville:

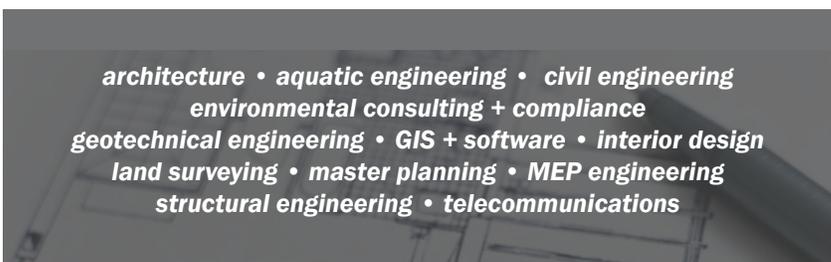
- We confirm that we meet the appropriate state licensing requirements to practice in the State of Wisconsin.
- We confirm that we have not had a record of substandard work within the last 5 years.
- We confirm that we have not engaged in any unethical practices within the last 5 years.



# About Ramaker

Ramaker is a full-service architecture + engineering firm headquartered in Sauk City, Wisconsin. At Ramaker, we are experts in our field, yet we understand that creating a state-of-the-art facility is not only about construction plan development. It is about listening to our clients, understanding their needs, and collaborating with them to bring the industry's best to their facility - throughout all phases of the design process. With creative ideas and decades of experience, we skillfully collaborate to achieve designs that reflect our client's vision and exceed their expectations.

We believe the ability to provide a wide range of services enhances our clients' projects to the next level. Our team of the most qualified and passionate professionals have worked on hundreds of projects together, and are able to complete your project in-house, regardless of the physical location of our staff. We utilize the most up-to-date software allowing us to collaborate in real time across all locations.



*architecture • aquatic engineering • civil engineering  
environmental consulting + compliance  
geotechnical engineering • GIS + software • interior design  
land surveying • master planning • MEP engineering  
structural engineering • telecommunications*

## GO-TO CONTACT DARYL MATZKE, PE



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S-Corporation

**Established** // 1992

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Sauk City, WI 53583

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**Web** // [ramaker.com](http://ramaker.com)

**Tax ID #** // 39-1739045

# FACTS ABOUT RAMAKER

WE'VE BEEN 100% EMPLOYEE-OWNED SINCE 2007.

This means employees assigned to your project are owners and care deeply about your project.

## THE RAMAKER DIFFERENCE

Ramaker sets the standard for innovative and efficient design solutions by uniting our creative side with sound engineering to deliver a great end-product. We recognize the passion and dedication that is involved with the creation of a large-scale project, and at Ramaker, we strive to deliver dream designs. Relationships are our priority, so our valued clients become our family. We look out for our client's best interests. You will feel a sincere partnership as we work with you through each phase of the project. As a 100% employee-owned company, we approach challenges from a broad perspective and are willing to do whatever it takes to get your project done as desired. After all – your success is our success.

107 total employees

49 states our staff is licensed in

32 professionally licensed staff

4 office locations nationwide

28 years we've been in business



# — / About Snyder & Associates

Snyder & Associates, Inc. is an Iowa-founded, multi-disciplinary planning and engineering firm serving clients throughout the Midwest and nationwide. An enduring philosophy of responsive, personal service tailored to individual client needs has guided us for over 40 years. As a community of problem solvers, we excel at pioneering sustainable, efficient solutions that help our clients achieve growth and resilience.

From historic preservation to new construction, we're committed to bringing your vision to life through creative, dependable solutions. Together, we'll explore new design, reconstruction, and repair options so you can make informed decisions. From concept through construction, we'll advocate on your behalf, working to minimize your administration and coordination need with comprehensive services spanning six sectors.



WATER



TRANSPORTATION



LAND DEVELOPMENT



PUBLIC SPACES



MUNICIPAL SERVICES



STRUCTURAL

## MADISON OFFICE

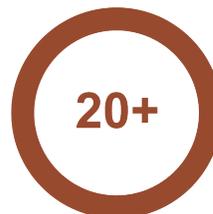
Our Madison office is staffed with landscape architects, planners, and civil engineers that will contribute to improvements for both West Side and Leonard-Leota Parks. Our team has worked on numerous park and athletic field projects across the Midwest and are well versed in the steps needed to complete successful projects. Additionally, our project experience spans the state of Wisconsin, giving us valuable insight into project costs, along with state, county, and city regulations.



EMPLOYEES



PROJECTS



STATE LICENSURES



REPEAT BUSINESS

# — / About Snyder & Associates

At Snyder & Associates, forward-thinking, experienced people are one of our greatest strengths. They're a catalyst for positive change, pushing the boundaries of possibility to improve the communities we serve and call home. With your immediate and future needs in mind, we'll help you proactively address infrastructure and environmental challenges.

For us, it's about more than just the project at hand. It's about building long-term relationships with the people we serve and improving community quality of life.



## GO-TO CONTACT ANDY MEESSMANN



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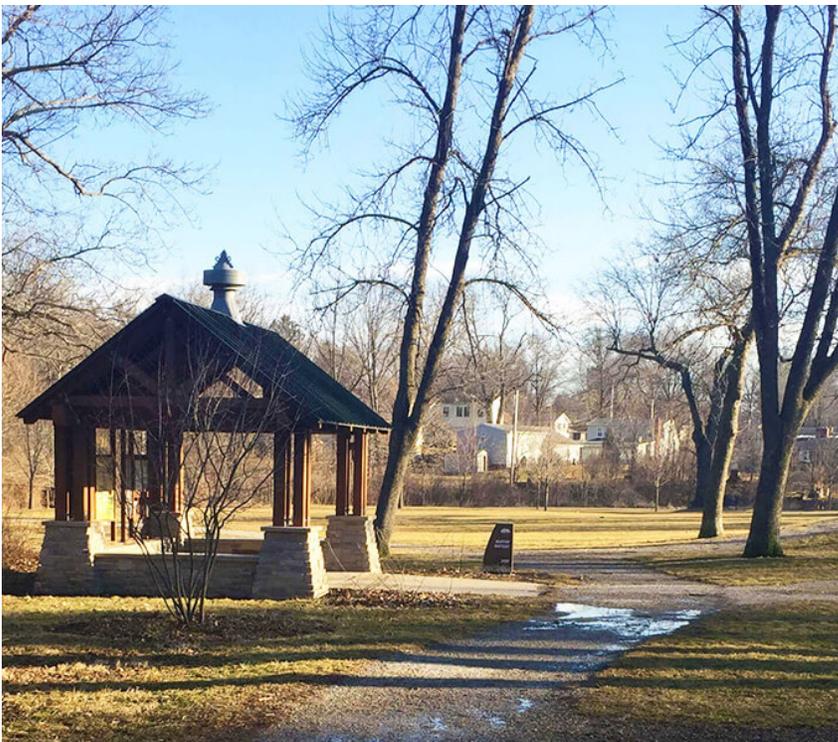
**Established** // 1977

**Address** //  
5010 Voges Road  
Madison, WI 53718

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# — / About McDonald Schaefer

McDonald Schaefer LLC specializes in directing multimillion-dollar capital campaigns. While we provide other fund development services, our forte is all stages of capital campaigns – from testing to planning to directing until completion. We are dedicated to working with our clients not only to achieve near-term goals but to implement a solid foundation for future fundraising success.

Formed in 1996, McDonald Schaefer has helped a variety of nonprofit organizations throughout Wisconsin raise tens-of-millions in funds for operational, capital and endowment projects.

McDonald Schaefer provides value to nonprofit organizations conducting capital campaigns in three significant ways:



## **PROCESS**

We specialize in planning and directing successful multimillion-dollar capital campaigns. Our years of experience in this field has propelled many of our clients to historically unprecedented campaign successes. Campaigns are made up of thousands of moving parts and the systems and processes that we have developed in the field over the years dramatically improve the efficiency and effectiveness of the campaigns we direct, as well as markedly improving their probability of success.

## **DISCIPLINE**

Campaigns involve dozens of key stakeholders, from board members to donors to volunteer fundraisers and staff. We are adept at directing the logistics of campaigns and engaging those involved and focusing their efforts to yield the productivity campaigns require. McDonald Schaefer drives the entire process. We provide the professional discipline that ensures a sustained rhythm and momentum – week to week and month to month – that carries the campaign all the way to its goal.

## **CAPACITY**

Few nonprofits can imagine taking on the considerable demands of a major capital campaign alone, in addition to regular staff duties. Most are working tirelessly just to meet the mission and budget needs of the organization. Nonprofits often need more bandwidth when taking on a campaign. By assigning a campaign team to the fundraising project, we effectively double or triple the resources dedicated to your campaign. This type of full and proper resourcing is often the difference between struggling campaigns that may never reach their goal – or take several years to do so – and campaigns that march steadily toward their goal with enough people to get the job done expeditiously.



# — / About McDonald Schaefer

McDonald Schaefer helps nonprofits raise money from donors in the community for new building projects. The comprehensive, time-tested strategy they use is called a “capital campaign.” McDonald Schaefer specializes in conducting capital campaigns of the kind that will help you raise the monies you need for the West Side Park project. Here are a few examples of their work, selected because they’re not far from Evansville and/or these campaigns have a similar goal or purpose:

- **Aldo Leopold Nature Center, Monona (\$1.5 million raised)**
- **Habitat for Humanity of Dane County, Madison (\$1.4 million raised)**
- **Monroe Clinic & Hospital (\$2.8 million raised)**
- **Mukwonago YMCA (\$10 million raised, Mukwonago is a community of 7,500)**
- **Second Harvest Foodbank of Southern WI, Madison (\$2 million raised)**
- **Stoughton Hospital (\$2.4 million raised)**
- **Waunakee Public Library (\$1.5 million raised)**

It is noteworthy that McDonald Schaefer’s Vice President, Andrea Speth, and her husband Paul lived in Evansville for 25 years before recently moving to Mineral Point. Her deep and long familiarity with the community will be exceptionally relevant and beneficial to the project, whether she is the assigned Campaign Director herself or is assisting the assigned Campaign Director.



## GO-TO CONTACT DAVID MALONE



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**03**

**SIMILAR PROJECTS**



## MAGNOLIA GREEN

MOSELEY, VA

The aquatic center includes an 8-lane, 25 yard lap pool; wading pool with multi-level play structure; activity pool with two waterslides, a water play area, and sun shelf; and a lounging pool with sun shelves, bench seating and shade structures.

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 4 pools, 13,275 SF total pool area

**FEATURES** // Design of a new neighborhood aquatic center with competition, wading, activity, and leisure pools



## HAWKS LANDING

VERONA, WI

Hawks Landing Golf Club's aquatic facility includes a multi-use competition/leisure pool with eight competitive lanes, a diving well, a winding body slide ending in a plunge pool, and a zero depth entry children's water play area with interactive features.

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 6,000 SF total pool area

**FEATURES** // New facility with entertainment for young families with a beach entry, waterslides, and a competition lap pool



## PERU SPLASH PAD

PERU, IL

This baseball-themed splash pad's name was acquired from the donation of Toronto Blue Jay's pitcher J.A. Happ, a Peru local.

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 20,000 SF

**FEATURES** // 80 surface spray features



## BELLE CHASSE YMCA

BELLE CHASSE, LA

Belle Chasse YMCA includes a Wading Pool with zero depth entrance, Leisure Pool with a deck-mounted spiral slide, a Shallow Water Tanning Ledge and 4-lane Lap Pool. The water surface level of the Lap Pool is elevated 12 inches above the Leisure Pool. Water flows from the Lap Pool to the Leisure Pool over a “vanishing edge.”

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 6,500 SF total pool area



## DIGGERLAND USA

WEST BERLIN, NJ

Diggerland has a large pool with a beach entry, play features, basketball hoops, floating play features, a current channel and vortex area, an open swim area, and a 23-foot tall slide tower! It also has a children’s wading pool with play features and kiddie slides. The pool deck area has lounging areas, a concession building, and a bathhouse/pool equipment building.

**SERVICES PROVIDED** // Aquatic Design & Engineering, MEP Engineering

**SIZE** // 2 pools, 13,460 SF total pool area

**FEATURES** // Two 23’ waterslides



## COLBURN PARK

GREEN BAY, WI

Evaluation of existing facility for replacement or renovation. Proceeded with restoration of the City’s 50+ year old aquatic facility, including pool & bathhouse improvements. New life for a community fixture and family fun for future generations.

**SERVICES PROVIDED** // Aquatic Design and Engineering, Architecture, MEP Engineering

**YEAR COMPLETE** // 2020

**SIZE** // 16,520 SF total pool area

**FEATURES** // New pvc liner/pool liner/gutter grating, water treatment equipment, & bathhouse improvements.



## HILL FARM SWIM CLUB

MADISON, WI

Hill Farm has some of the oldest, strongest traditions among Madison All-City pools. Though the diving well is separate from the 8-lane, 25-meter competition pool, Ramaker was able to help overcome budget challenges by engineering a single water treatment system.

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 5,947 SF total pool area

**FEATURES** // New competition pool, diving well, and wading pool



## MAPLE BLUFF COUNTRY CLUB

MADISON, WI

The project consisted of the construction of a new eight lane, 25 yard Competition Swimming Pool with an attached Diving Well and a separate Wading Pool. This project also included a unique feature – a below-grade equipment room hidden by landscaping for no visual impact to the golf course.

**SERVICES PROVIDED** // Aquatic Design & Engineering, MEP & Structural Engineering

**SIZE** // 5.600 SF total pool area

**FEATURES** // New competition pool, diving well, and wading pool



## EPIC WATERS

GRAND PRAIRIE, TX

The Epic Waters Indoor Waterpark includes six waterslides, a FlowRider, activity pool with play features, wading pool with a multi-level play structure, lazy river, and a wave pool.

**SERVICES PROVIDED** // Aquatic Design & Engineering, Structural Engineering

**SIZE** // 80,000 SF waterpark



## WARNER PARK COMMUNITY CENTER MADISON, WI

The Warner Park Community Rec Center desires to expand with an indoor aquatic facility. For development of the Concept Plan, Ramaker met with the COF to review the project scope and address design, programming and operational considerations. Multiple concepts were developed and presented for COF and Community feedback.

**SERVICES PROVIDED** // Aquatic Design & Engineering, Architecture, Master Planning

**SIZE** // 87,000 SF building addition, dual level

**FEATURES** // 3 indoor pools & outdoor splash pad



## WESTMOOR COUNTRY CLUB BROOKFIELD, WI

Splash Pad addition to an existing outdoor pool area.

**SERVICES PROVIDED** // Aquatic Design & Engineering

**SIZE** // 900 SF Splash Pad, Deck Area, and Water Treatment Equipment/Structure

**FEATURES** // Five fun and vibrant features to entertain the little ones (and parents, too).



## BETHPAGE CAMP RESORT URBANNA, VA

Ramaker's multi-discipline capabilities helped to increase the fun at this successful campground.

**SERVICES PROVIDED** // Aquatic Engineering, Architectural Services, Structural Engineering, Electrical and Plumbing Design for the pools, water features, and bathhouse/equipment building.

**SIZE** // 7,500 SF of water surface added for a 400+ patron capacity.

**FEATURES** // Two body slides and a bowl slide, two plunge pools, an activity pool with water walk feature, and two splash pads.



## FOOTBALL/SOCCER STADIUM & BASEBALL FIELD RENOVATIONS

MCFARLAND, WI

Snyder & Associates developed master plans and construction documents for the renovated stadium, field, and adjacent site improvements to McFarland High School Stadium, and two baseball fields. The plans helped alleviate flooding and provided improved access to school additions, increased storage for stormwater, and improved site circulation.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering

**SIZE** // 1 multi-use field (soccer and football) 1 synthetic turf baseball field 1 traditional turf field



## BAKKEN PARK

COTTAGE GROVE, WI

The Client selected Snyder & Associates to develop a master plan, construction documents, and supporting bidding documentation for a Miracle Field at Bakken Park. We are working with the Village and volunteers for the Miracle League to simplify and unite the overall park's existing uses with several new improvements to create a memorable and enhanced park experience for users.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering, Surveying

**SIZE** // 125' rubberized surface field



## PRAIRIE RIDGE ATHLETIC COMPLEX

ANKENY, IA

Snyder provided design and engineering services for the 124-acre community athletic complex. Facilities include baseball and softball fields, soccer fields, football fields, trails, and parking lots integrated around a linear pond system.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering, Construction Services

**SIZE** // 15 baseball fields, 9 soccer fields, 6 softball fields, 5 football fields, 12 night lighting fields, 4 concession stands with restrooms



## DOANES PARK

PLEASANT HILL, IA

Snyder developed a master plan that preserved the amenities in the 43-acre community park. Snyder built public consensus to include many amenities. These features are connected by trails in the park.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering, 3D Graphic Services, Construction Services

**SIZE** // 3 baseball/softball fields, 3 tennis courts/pickle ball, 1 basketball court, 1 maintenance building, 1 restroom structure, 2 open air shelters, 1 new playground area



## AMES ATHLETIC COMPLEX

AMES, IA

The Ames project centered on the development of a 26-acre parcel of land. Snyder created the master plan design, which required public meetings to share the proposed improvements. To accommodate a high level of use and various athletic needs, Snyder planned for a multi-use space.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering, 3D Graphic Services, Construction Services

**SIZE** // 4 baseball/softball fields, 8 tennis courts, 176 parking stalls, 3,000 linear feet of soft and hard surface trails, 1 new playground area



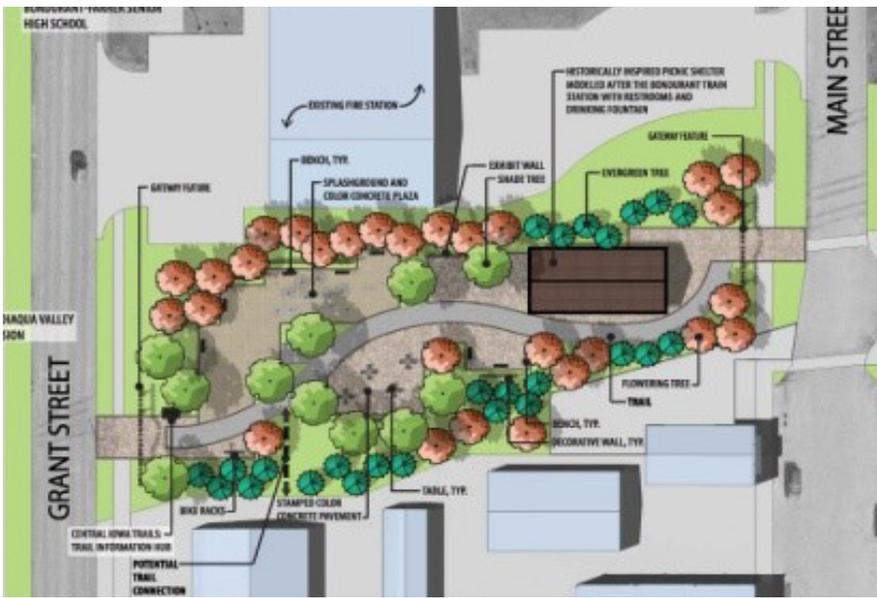
## PRAIRIE HERITAGE CIVIC CENTER PLAZA

ALTOONA, IA

This project is an 11-acre park that's linked to residential/commercial developments through a series of trails. Primary elements for the park focused on community events such as outdoor concerts. The Master Plan incorporated entry pergolas, an outdoor amphitheater, restrooms, gazebo, sculptural plaza, splash grounds, pond, wetlands, waterfall, boardwalk, trails, and landscape enhancements.

**SERVICES PROVIDED** // Landscape Architecture, Civil Engineering, Surveying

**SIZE** // 1-acre of plaza and splash ground area, 1 mile of hard surface trails



## BONDURANT REGIONAL TRAILHEAD

BONDURANT, IA

Snyder conducted public meetings and prepared a Master Plan for this his trail hub and community gathering space that is located at the convergence of several trails. The project incorporates a shelter with restrooms, seating areas, a splash ground, and trail hub kiosk. Entryway features and screening walls were based on the railroad theme and give the site a unique flare that references the site and Bondurant's past.

**SERVICES PROVIDED** // Landscape Architecture, Surveying

**SIZE** // 2,000 SF shelter



## FAIRMOUNT PARK

COUNCIL BLUFFS, IA

The park included the city's first water playground and an adjacent plaza. The splash pad includes 11 different spray components. Other park components included two open shelters, retaining walls, a fire ring, specialty pavement and trail connections to the park. This unique park will once again attract families to gather, play and enjoy this historic area.

**SERVICES PROVIDED** // Landscape Architecture, Comprehensive Planning, Construction Services

**SIZE** // 2,100 SF spay pad area, 1,100 linear ft of new connecting trails



# 04

## STAFF EXPERIENCE & QUALIFICATIONS



# RAMAKER'S REFERENCES



## 01 **TIM RITCHIE** FORMER AQUATICS DIRECTOR

**ORGANIZATION** // Ridgewood and Hawks Landing Pools  
**PHONE** // (608) 960-1606  
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## 02 **SHANE RYAN** OWNER

**ORGANIZATION** // Madison Aquatics Club  
**PROJECT** // Warner Park Aquatic Center Master Planning  
**PHONE** // (608) 217-7081  
**EMAIL** // coachshaneryan@gmail.com

## 03 **JOSH LEPINE, CGCS** MAINTENANCE SUPERINTENDENT

**ORGANIZATION** // Maple Bluff Country Club  
**ADDRESS** // 500 Kensington Drive, Madison WI 53704  
**PHONE** // (608) 249-3468  
**EMAIL** // joshl@mbcc1899.com

## 04 **KAURIE MIHM** PARK PLANNER

**ORGANIZATION** // City of Green Bay, WI  
**PROJECT** // Colburn Park Pool  
**PHONE** // (920) 448-3382  
**EMAIL** // kaurie.mihm@greenbaywi.gov

## 05 **JOHN LEHAN** DIRECTOR

**ORGANIZATION** // Sauk Prairie Recreation Department  
**PROJECT** // New Community Outdoor Pool, New Indoor HS Pool  
**PHONE** // (608) 643-0520  
**EMAIL** // john.lehan@saukprairieschools.org

# SNYDER'S REFERENCES



## 01 PAUL ACKLEY DIRECTOR OF ATHLETICS

**ORGANIZATION** // Village of McFarland School District  
**PROJECT** // McFarland HS Stadium & Baseball Fields  
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## 02 GREG SWEENEY MIRACLE LEAGUE OF DANE COUNTY

**ORGANIZATION** // Miracle League of Dane County  
**PROJECT** // Miracle League Baseball Field at Bakken Park  
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## 03 SEAN BRUSEGAR DIRECTOR OF PARKS, REC AND FORESTRY

**ORGANIZATION** // Village of Cottage Grove  
**PROJECT** // Bakken Park  
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## 04 MIKE AXON PARKS AND REC DIRECTOR

**ORGANIZATION** // Village of Cross Plains  
**PHONE** // (608) 798-3241 ext. 107  
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## 05 VINCENT MARTORELLO DIRECTOR OF PARKS & RECREATION

**ORGANIZATION** // City of Council Bluffs, IA  
**PROJECT** // Fairmount Park  
**PHONE** // (712) 328-4650  
**EMAIL** // [vmartorello@councilbluffs-ia.gov](mailto:vmartorello@councilbluffs-ia.gov)

## 06 NICK LENOX DIRECTOR

**ORGANIZATION** // Ankeny Parks & Recreation  
**PROJECT** // Prairie Ridge Athletic Complex  
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## 07 BEN CHAMP CITY MANAGER

**ORGANIZATION** // City of Pleasant Hill, IA  
**PROJECT** // Doanes Park  
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# Project Team



## DARYL MATZKE, PE

AQUATICS/CIVIL/SURVEY MARKET LEADER

**Years Experience** // 31

**Education** // B.S. in Civil Engineering from Michigan Technological University

**Licenses & Certifications** // Licensed Professional Engineer



## ERIC KAUL, PE

AQUATICS/CIVIL/SURVEY SERVICE GROUP LEADER

**Years Experience** // 9

**Education** // B.S., Civil Engineering: University of Wisconsin – Platteville

**Licenses & Certifications** // Licensed Professional Engineer: Wisconsin



## JOHN OLTHAFER

AQUATICS DESIGN SPECIALIST

**Years Experience** // 33

**Education** // Mechanical Drafting: Southwest Wisconsin Vocational Technical Institute



## KYLE REGER

AQUATICS TECHNICIAN

**Years Experience** // 7

**Education** // B.S. in Mechanical Engineering: University of Wisconsin - Platteville



## KATIE HALVERSON, PE

CIVIL ENGINEER

**Years Experience** // 8

**Education** // B.S., Civil Engineering: Michigan Technological University

**Licenses & Certifications** // Licensed Professional Engineer



## JORDAN BRANDON, EIT

CIVIL ENGINEER

**Years Experience** // 3

**Education** // B.S. in Civil Engineering: South Dakota State University

# Project Team



**JOE GALLAGHER, AIA**

LEAD ARCHITECT

**Years Experience // 10**

**Education //** Master of Architecture (M. Arch) Temple University, B.S. in Architecture Roger Williams University

**Licenses & Certifications //**  
Licensed and Registered Architect  
NCARB Certified, LEED Green Associate



**RHONDA HEGGE**

ARCHITECTURAL DESIGNER

**Years Experience // 10**

**Education //** B.S., Civil Architectural Studies, University of Wisconsin - Milwaukee, School of Architecture and Urban Planning



**JEFF ZANDER, PE**

MEP/S SERVICE GROUP LEADER

**Years Experience // 27**

**Education //** B.S., Civil Engineering: University of Wisconsin - Platteville Structural Emphasis

**Licenses & Certifications //**  
Licensed Professional Engineer: IA, MN, WI, FL; LEED AP Building Design + Construction



**TONY LOBRACO**

ELECTRICAL ENGINEER

**Years Experience // 20**

**Education //** B.A., Electrical/Mechanical Computer Aided Drafting & Computer Technology: Herzing University—Madison WI



**DAVE ROBERTS**

PLUMBING ENGINEER

**Years Experience // 20**

**Education //** Associates Degree: Madison College

**Licenses & Certifications //**  
State of Wisconsin Certified Designer of Engineered Systems / Plumbing



**NATALIE FELDER, EIT**

MECHANICAL ENGINEER

**Years Experience // 4**

**Education //** B.S., Mechanical Engineering: University of Central Florida

**Licenses & Certifications //**  
Licenses & Certifications: Engineer in Training (EIT)

# Project Team



**ANDY MEESMANN,  
PLA**

SNYDER - LANDSCAPE ARCHITECT

**Years Experience // 11**

**Education //** BSCR, Iowa State University; MLA, Kansas State University

**Licenses & Certifications //** Professional Landscape Architect



**TIM WEST, PLA, LEED**

SNYDER - LANDSCAPE ARCHITECT

**Years Experience // 25**

**Education //** Bachelor of Landscape Architecture, Iowa State University

**Licenses & Certifications //** Professional Landscape Architect



**SCOTT ANDERSON, PE**

CIVIL ENGINEER

**Years Experience // 18**

**Education //** BSCE University of Wisconsin - Platteville

**Licenses & Certifications //** Licensed Professional Engineer



**DAVID MALONE**

MCDONALD SCHAEFER -  
FUNDRAISING STRATEGIST

**Years Experience // 28**

**Education //** B.A., Business Administration and Management Information Systems: University of Wisconsin - Eau Claire



The background of the slide features a vibrant outdoor swimming pool. In the foreground, several bright green lounge chairs with yellow mesh seats are arranged on a light-colored concrete deck. The pool water is a clear, bright blue. In the background, a multi-story building with red and brown siding and a black metal staircase is visible under a clear blue sky with a few wispy clouds.

# 05

## PROJECT APPROACH, DESCRIPTION, & SCOPE OF SERVICES

# PROJECT APPROACH



Our Team is prepared to engage in the work of this contract and can begin upon notice to proceed from the City. Current workload includes a variety of projects that span our diverse staff of professionals. Most staff have been cross trained with other departments providing the ability to allocate resources depending on the project needs. This availability of talent is a key component for meeting and exceeding client expectations, preventing project hold-ups. We have the flexibility to accommodate a project's critical path to success.

Extensive experience and the most up-to-date technology allow us to creatively design projects that meet the aesthetic and functional needs of each client. We insist on quality and clarity. Equally important, we have a passionate commitment to creating solid partnerships with our clients. We strive to understand our client's needs and work closely together to address them. Our Team welcomes the opportunity to serve the City with unique freshness in design.

New client implementation begins with a project/team introduction meeting facilitated with an agenda to define the project scope, client goals, schedules, and responsibilities. Tools include responsibility matrices, a website for sharing project information, and similar open communication methods with an emphasis on personal commitment and mutual respect. The Project success relies upon the establishment and maintenance of positive client/consultant relationships. Your project is our project. Your success is our success.

**We enjoy what we do, which is ultimately reflected  
in our work and our Client's satisfaction!**



# PROJECT DESCRIPTION

## WEST SIDE PARK

Concept Plans for the West Side Park were developed in 2018. The concepts maintained the existing Municipal Wellhouse, Restroom Buildings, Pavilion Structure, Playground, and Parking Areas accessed from S 6th Street. As these elements occupy just over 3-acres, approximately 20-acres of park land is available for development. With additional planned public street connections of S Wyler Drive and Porter Road along with pedestrian easements to the north and south, access to the park is readily available from the adjacent neighborhoods as well as the Community at large.

Our goal is to nurture the past concepts and current ideas for the evolution of a park design that satisfies the diverse needs and desires of neighbors and City residents ranging from walkers to gardeners to sport leagues. In collaboration with the Recreation Department and City staff, we will facilitate public meetings to garner public input. With the incorporation of the Aquatic Center (described below) into the previously developed West Side Park concept plans, the desired amenities will exceed the space available. Through mindful discussions and budget evaluations, we will work with the City to meet the challenges.

Past planning and careful design is evident in Leonard-Leota Park and the park's success can be attributed to this level of care and detail. Our design team will uphold similar design thresholds and creativity to ensure the success of West Side Park and the Aquatic Center.

### ANTICIPATED PARK COMPONENTS INCLUDE

- 1 Artificial Turf Soccer Field
- 2 Grass Soccer Fields
- 1 Youth Size Softball/Baseball Field
- 2 Full Size Softball/Baseball Fields
- Basketball Court
- Playground
- Walking/Bike Paths
- Community Gardens
- Picnic Areas
- Pavilion/Shelter Facilities
- Restroom Facilities
- Parking
- Stormwater Management



# PROJECT DESCRIPTION

## AQUATIC CENTER

An Aquatic Center Concept was developed in 2017 for the City of Evansville. This concept anticipated that the Aquatic Center location would remain within the Leonard-Leota Park where it has been a fixture for over 60 years. As park and pool considerations evolved during the past four years, it was determined that construction of a new Aquatic Center as an amenity of the West Side Park would best serve the community.

Understanding that the intent is to build upon the solid effort put forth, our project Team will facilitate public discussions and engage with primary users of the future Aquatic Center. The purpose will be to confirm proposed features or modify the design as community needs and desires are refined, and budget commitments defined. The public feedback and City staff input along with Ramaker's extensive aquatic design experience will allow the pool area and bathhouse design to benefit the City for the next 60+ years.

**The proposed facility should be designed for multi-generational appeal – from tots to seniors and all ages between – meeting a variety of needs and desires including:**

- Recreational Swimming
- Lap Swimming
- Diving
- Event Rentals
- Family & Group Gatherings
- Competitive Swimming
- Instructional Programs
- Exercise & Aerobic Classes
- Lounging & Family Fun
- Community Social Hub

**For development of the anticipated scope of services and fee, the following components/features have been assumed for the proposed Aquatic Center.**

- Bathhouse/Concession Building
- Pool Equipment Building
- Wading Pool with Play Features
- Lap Pool with Deep Well
- Activity/Social Pool
- Waterslides
- Deck, Lounging, and Landscape Areas
- Patron Access/Parking

# PROJECT DESCRIPTION

## LEONARD-LEOTA PARK



The opportunity to work with residents and City Leadership for the rejuvenation of the area currently occupied by the existing Aquatic Center will further establish Leonard-Leota as the flagship park in Evansville. Removal of the Aquatic Center provides the opportunity to improve the access drive and parking area as well as restore the land to its natural topography. The hillside restoration will be an enhancement complimentary to the mature trees, lake views, and stream environment.

Active water play will still be provided with the proposed addition of a Splash Pad to the Park. Alternative locations and themes for Splash Pad features will be evaluated as well as operational considerations (flow through or recirculated/treated water designs). Whether the Splash Pad incorporates bright colors/whimsical features or complements the historic/organic aspects of this park, the fun factor will be ever present within this Park.



# 01 PROJECT APPROACH

## PUBLIC ENGAGEMENT/SCHMATIC DESIGN

- Create a detailed project timeline between April 2021 and Completion in 2023.
- Develop a public outreach and communication strategy.
- Gather public input through interviews, charettes, surveys, or other means that specifically engage primary aquatic center/pool and park stakeholders.
- Create Schematic Design of new Aquatic Center, Park, and Splash Pad in close consultation with City staff.
- Assist in developing a fundraising plan and/or other grant applications for the project budget.



## FUNDRAISING PLANS

It is not uncommon for community campaigns with a goal of \$1.5 million to last approx. 24 months. Numerous variables can affect how long a campaign actually lasts and the term of your campaign could be shorter or longer and it is difficult to predict ahead of time.

One option you may exercise is to have McDonald Schaefer conduct a fundraising feasibility study. This exercise engages your potential donors to determine their interest in supporting the project before it begins and provides valuable perspectives on how much might be raised and how long it might take. McDonald Schaefer offers three levels of engagement to plan and lead your campaign varying in cost and scope of services. Additional variable costs are all subject to client preference.

Although McDonald Schaefer will plan and lead the campaign, it will require the involvement of many local volunteers. One of McDonald Schaefer's key priorities is to help you organize a cadre of local volunteers because successful campaigns are based on relationships and people asking other people they already know and trust to consider a financial gift to the campaign.

For more detailed information, McDonald Schaefer's full proposal is located in Appendix A at the end of this proposal.

# 02 PROJECT APPROACH

## DESIGN DEVELOPMENT/CONSTRUCTION DOCS

- Utilize existing conditions, topographic and property surveys provided by the City's Municipal Engineer for the West Side Park and area around existing Aquatic Center in Leonard-Leota Park. Survey control shall be provided by the City's Municipal Engineer.
- In collaboration with the City's Municipal Engineer, perform Geotechnical evaluations necessary for infrastructure, storm water management, building, and aquatic feature designs.
- Design infrastructure improvements within the Park to serve the Park features, Aquatic Center, and Splash Pad. Public street and utility design shall be addressed by the City's Municipal Engineer.
- Develop construction plans and specifications for the Park, Aquatic Center and Splash Pad as well as demolition/site restoration for the existing Aquatic Center.
- Perform an environmental investigation of the existing Aquatic Center for compliance with applicable environmental regulations.



# 03 PROJECT APPROACH

## BIDDING/CONSTRUCTION ADMINISTRATION

- Prepare bid documents.
- Address Contractor's Requests for Information.
- Provide digital files of proposed improvements to facilitate construction staking by the Contractors.
- Review and approve Contractor shop drawing submittals for general design compliance.
- Review Contractor pay application and forward to City with appropriate payment recommendations.
- Facilitate the construction close out process (punch lists, final inspections, contractor provided as-built documents, final lien waivers).
- Provide periodic construction observation to determine general conformance with the construction documents and construction contract.
- Providing reproducible "As Built" plan drawings to the City upon project completion.
- Inspect and review of warranty work one year after close-out.
- Maintain required records for at least three years after the City makes the final payment and all pending matters are closed.



A background image featuring a dynamic splash of water in the foreground, with a bokeh effect of light spots in the background, suggesting an outdoor setting at dusk or dawn. The water splash is detailed, showing individual droplets and bubbles. The bokeh lights are warm and golden, creating a soft, atmospheric glow.

# 06

## ESTIMATED FEES & BILLING RATES

# PROFESSIONAL AE SERVICES

## ESTIMATED FEE AMOUNTS

Architectural, Engineering, Landscape Architectural Services

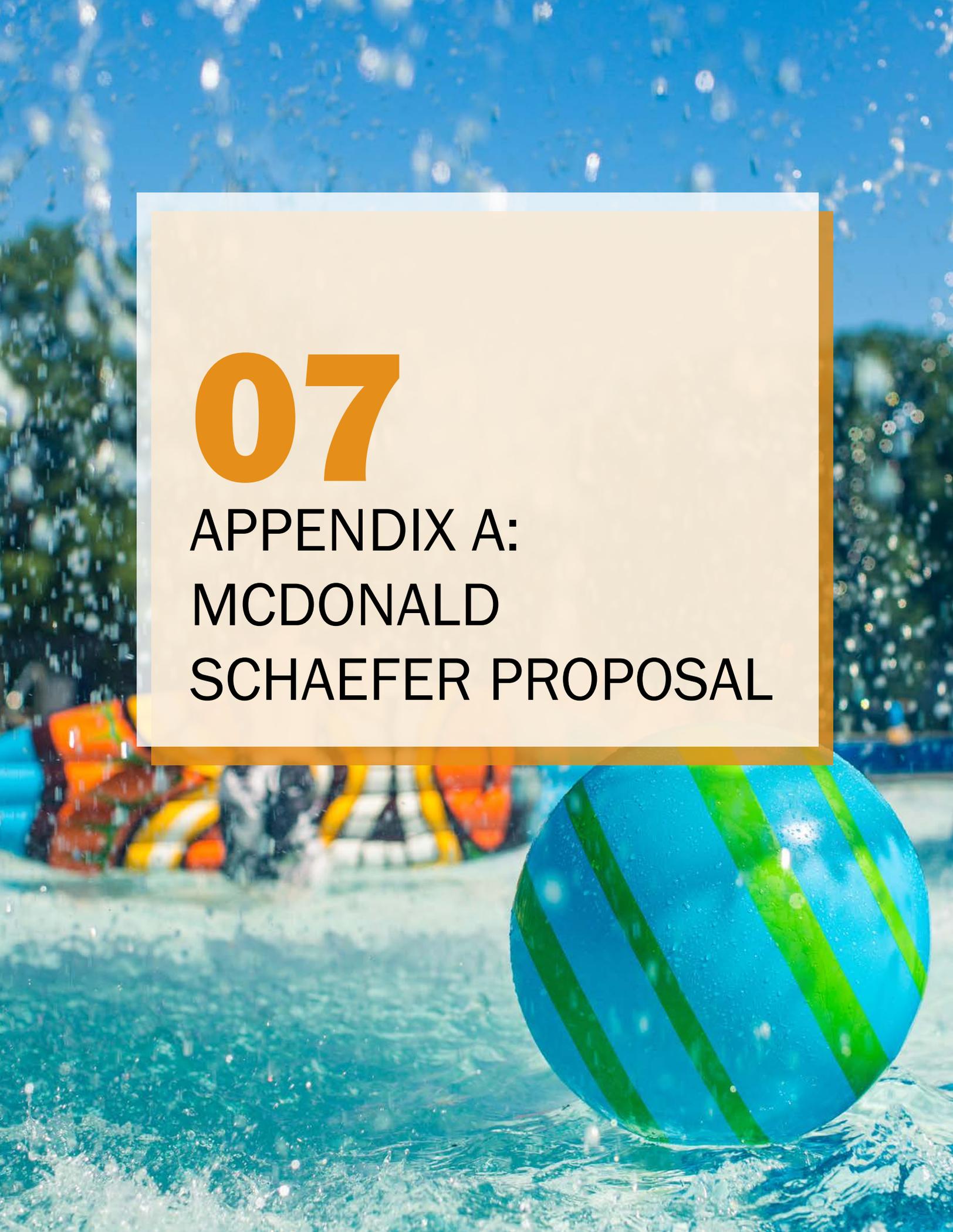
|                                    |                  |
|------------------------------------|------------------|
| <b>PUBLIC ENGAGEMENT</b>           | \$60,000         |
| <b>SCHEMATIC DESIGN</b>            | \$75,000         |
| <b>DESIGN DEVELOPMENT</b>          | \$320,000        |
| <b>CONSTRUCTION DOCUMENTS</b>      | \$320,000        |
| <b>BIDDING</b>                     | \$5,000          |
| <b>CONSTRUCTION ADMINISTRATION</b> | \$100,000        |
| <b>TOTAL</b>                       | <b>\$880,000</b> |

## 2021 HOURLY BILLING RATES

|  |          |
|--|----------|
| <b>ADMINISTRATIVE SERVICES</b>                     | \$75/hr  |
| <b>LANDSCAPE ARCHITECT</b>                         | \$100/hr |
| <b>PROFESSIONAL LANDSCAPE ARCHITECT (PLA)</b>      | \$120/hr |
| <b>SENIOR LANDSCAPE ARCHITECT (PLA)</b>            | \$140/hr |
| <b>ARCHITECTURAL DESIGN TECHNICIAN</b>             | \$100/hr |
| <b>SENIOR ARCHITECTURAL DESIGNER</b>               | \$125/hr |
| <b>ENGINEERING TECHNICIAN</b>                      | \$100/hr |
| <b>SENIOR ENGINEERING TECHNICIAN</b>               | \$125/hr |
| <b>ENGINEER IN TRAINING (EIT)</b>                  | \$100/hr |
| <b>LICENSED ENGINEER (PE)</b>                      | \$125/hr |
| <b>SENIOR LICENSED ENGINEER/ARCHITECT (PE/AIA)</b> | \$150/hr |
| <b>SENIOR LICENSED STRUCTURAL ENGINEER (SE/PE)</b> | \$175/hr |
| <b>PROJECT MANAGER</b>                             | \$125/hr |
| <b>SERVICE GROUP LEADER</b>                        | \$165/hr |
| <b>MARKET LEADER/PRINCIPAL-IN-CHARGE</b>           | \$235/hr |

**The above estimates do not include fundraising efforts. The above fee estimates may be adjusted upon scope confirmation during project evolution.**

If the Client or Owner is a tax-exempt entity, it is the Client's responsibility to provide Ramaker proper documentation of tax-exempt status. Reimbursable Expenses, including reproductions, shipping, mileage, and meals, shall be invoiced as incurred without mark-up. Invoices on a percent completion basis plus expenses will be submitted monthly. The Client shall be responsible for payment of regulatory plan review, inspection, and licensing fees.



**07**

**APPENDIX A:  
MCDONALD  
SCHAEFER PROPOSAL**



McDonald**Schaefer**

*Fund Development Advisors to Nonprofits*

Milwaukee | Madison

## Proposal for Capital Campaign Management Services

**CONFIDENTIAL**

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## McDonald Schaefer Overview

McDonald Schaefer<sup>LLC</sup> is pleased to provide this proposal for managing your capital campaign. Our firm specializes in directing multimillion-dollar capital campaigns. While we provide other fund development services, our forte is all stages of capital campaigns – from testing to planning to directing until completion. We are dedicated to working with our clients not only to achieve near-term goals but to implement a solid foundation for future fundraising success.

Formed in 1996, McDonald Schaefer has helped a variety of nonprofit organizations throughout Wisconsin raise tens-of-millions in funds for operational, capital and endowment projects. Please visit [mcdonaldschaefers.com](http://mcdonaldschaefers.com) for more information.

## What We Do

McDonald Schaefer provides **value** to nonprofit organizations conducting capital campaigns in three significant ways:



**Process** – We specialize in planning and directing successful multimillion-dollar capital campaigns. Our years of experience in this field has propelled many of our clients to historically unprecedented campaign successes. Campaigns are made up of thousands of moving parts and the systems and processes that we have developed in the field over the years dramatically improve the efficiency and effectiveness of the campaigns we direct, as well as markedly improving their probability of success.



**Discipline** – Campaigns involve dozens of key stakeholders, from board members to donors to volunteer fundraisers and staff. We are adept at directing the logistics of campaigns and engaging those involved and focusing their efforts to yield the productivity campaigns require. McDonald Schaefer drives the entire process. We provide the professional discipline that ensures a sustained rhythm and momentum – week to week and month to month – that carries the campaign all the way to its goal.



**Capacity** – Few nonprofits can imagine taking on the considerable demands of a major capital campaign alone, in addition to regular staff duties. Most are working tirelessly just to meet the mission and budget needs of the organization. Nonprofits often need more bandwidth when taking on a campaign. By assigning a campaign team to the fundraising project, we effectively double or triple the resources dedicated to your campaign. This type of full and proper resourcing is often the difference between struggling campaigns that may never reach their goal – or take several years to do so – and campaigns that march steadily toward their goal with enough people to get the job done expeditiously.

## Project Team Credentials



The depth and strength of our fundraising expertise can be attributed in large part to the diversity of skills and experiences shared by our firm’s employees. We pride ourselves on a team that shares a varied set of development specialties and passions, comprehensive industry knowledge and a commitment to project success. Our staffing model, which is customized to complement each client’s strengths and challenges, adds tremendous value to our work. With our model, we can harness the full resources and knowledge of our team for the benefit of each organization with which we partner.

For an engagement with your organization, McDonald Schaefer’s entire team may be involved in varied capacities and will always be available to you as a resource. One consultant would be selected as lead Campaign Director to ensure optimal communication and streamlined management. Our Team members are introduced below, and more complete credentials are available as requested.

### David Malone, President



David’s 20 years of development experience combined with his earlier 13 years in sales and marketing positions make him one of the primary architects of McDonald Schaefer’s fundraising strategies. His expertise includes capital campaigns, major gifts and feasibility studies. David has assisted a wide variety of organizations ranging from emerging nonprofits to large, well-established NPOs with statewide, national and even international constituencies. He has planned and directed numerous successful capital campaigns and participated in securing several multimillion-dollar and six-figure major gifts. David has regularly advised clients in diverse fields such as healthcare, education, environment, religion, libraries, sports & recreation and more. He believes donor-centered fundraising can help nonprofits meet short-term and long-term funding needs. He is creative and process-minded and is adept at blending the relationship side of development with the process of effective fundraising. David earned a B.A. from the University of Wisconsin-Eau Claire with a double major in Business Administration and Management Information Systems. He lives in Madison.

### Andrea Speth, Vice President

Andrea has over 24 years' experience working in marketing, communications and fundraising, with



additional expertise in annual plan development and implementation, capital campaigns, feasibility studies and donor cultivation. Throughout her career, she has worked exclusively with nonprofit organizations with special emphasis on those supporting individuals at the margins of society. She is especially proud of her work with The Easter Seal Society of Wisconsin and St. Coletta. At the latter, she consistently achieved annual goals in excess of \$1 million. Andrea's projects are guided by the principle that strong relationships are the key to successful outcomes, and her ability to assist her clients in identifying and nurturing these relationships has provided the bedrock for many of her successes. Andrea earned a B.S. in secondary

education with minors in Technical and Creative Writing from the University of Wisconsin-La Crosse.

She loves to hike and spends as much time as she can with the people she loves, especially her husband and two dogs.

### Kim Koch, Sr. Consultant

Over the course of 20 years, Kim has developed relationship-building expertise in a range of professional areas from advertising/public relations, event planning and nonprofit development.



Kim understands the essential components of fundraising on every level and believes that listening to donors' needs is the key to executing successful campaigns and projects. Kim is a goal-oriented, strategic planner whose skills include working with clients on multimillion-dollar capital campaigns, feasibility studies, conducting in-depth prospect research, developing and coordinating communications pieces for solicitation efforts, managing donor prospects databases, tracking moves management, establishing campaign timelines and directing the logistics for

successful campaign events. Kim earned B.S. degrees in both Advertising and Public Relations from Southern Illinois University. An active member of the local AFP chapter, she is the National Philanthropy Day Event Logistics Chair. She lives in Wauwatosa and enjoys running, cycling, golf and painting but most of all, she enjoys spending time with her daughter.

### Teresa Midthun, Sr. Consultant

With more than 20 years of demonstrated success in raising major gifts and advancing organizational



goals, Teresa's accomplishments span a range of nonprofit engagements – large and small; global and local. With extensive experience in nonprofit leadership, annual giving, planned giving and major gifts fundraising, Teresa brings a diverse and seasoned expertise to the McDonald Schaefer team. Prior to joining McDonald Schaefer, she served as the Executive Director and VP of Advancement at the Oakwood Foundation; the Director of Philanthropy at the Nature Conservancy in Wisconsin; and Director of Development at the University of Wisconsin Foundation. Her capital campaign successes have spanned several sectors, including higher education, environmental welfare, healthcare and social services. Teresa prides

herself on her results-oriented, collaborative management and communication style, and is passionate about building productive donor and community partnerships. Teresa earned her B.A. from the University of Wisconsin-Madison and her MBA from Edgewood College. She holds a variety of memberships, including one with TEMPO Madison. Teresa lives in Waunakee with her husband and two daughters.

### James Hamilton, Consultant



James' diverse experience includes both direct development as well as development consulting for a wide variety of nonprofits over the last 15 years. As a Consultant, he has led campaigns to raise more than \$54 million for nonprofit clients in health care, education, human services and faith-based organizations. James approaches each engagement as a partnership with a focus on helping organizations raise transformational gifts and build their capabilities for on-going increased gift income. His expertise includes campaign feasibility studies, campaign management, major gifts, foundation and corporate fundraising, leadership fundraising training, and volunteer management. Prior to joining McDonald Schaefer, James led capital campaigns and other fundraising initiatives as President of Fox Advancement (Minneapolis, Minnesota) and as a consultant for Steier Group (Omaha, Nebraska). Previously, he helped raise the first \$5 million for the newly established Minnesota State Fair Foundation in St. Paul. James graduated from Macalester College and received his master's degree in non-profit leadership and management from the University of Minnesota. He and his wife live in Wauwatosa with their three kids.

### Julie Cotter, Consultant



For more than 20 years, Julie has worked in the non-profit field including at the Milwaukee and Madison YMCAs, Carroll University and most recently at VIP Services, an agency for people with disabilities. As Senior Advancement Officer at Carroll University, Julie was part of a small advancement team that raised \$30 million in a comprehensive campaign for new facilities, scholarships and programming. Through her work with the Wisconsin YMCAs she personally engaged dozens of potential donors and leaders during several feasibility studies for YMCA building projects around the state. While Development Director at VIP Services, she managed a growing development program as a one-person department. Julie has broad and extensive experience with major gifts, feasibility studies, volunteer engagement, annual campaigns, prospect research, donor analytics and special event management.

### Dr. Kathleen Voit, Senior Associate for Mission Impact



Dr. Kathleen Voit's work with McDonald Schaefer is centered on strategic relationship building and leveraging partnerships in collaboration with, and for the benefit of, our clients. Her 16-year tenure as President of the Madison Community Foundation afforded her invaluable experience in exactly the type of community outreach and "friend-raising" that many of McDonald Schaefer's clients benefit tremendously from. As a result, her experience makes her extremely effective in this tactical role. Dr. Voit has also demonstrated outstanding aptitude in organizational leadership and outreach, growing the Madison Community Foundation's funds from \$42 million to \$165 million, and holding senior positions in external relations at the Meriter Foundation, UW-Milwaukee, UW-Whitewater and at Arizona State University. Her insight into maximizing mission impact for cross-sector organizations makes her an extremely valuable resource to our clients.

Dr. Voit holds a doctorate and two master's degrees from UW-Madison and a bachelor's degree from UW-Whitewater. She has served on the boards of numerous community organizations and is a member of the In Business Hall of Fame. She has received the Association of Fundraising Professionals Visionary Award, YWCA Woman of Distinction Award, Urban League of Madison's Whitney M. Young Award and

Best of Madison Business Award.

**Dr. Thomas J. “Toby” Peters, Senior Associate for Mission Impact**

Dr. Peters has a distinguished track record of helping nonprofits strengthen their operations and



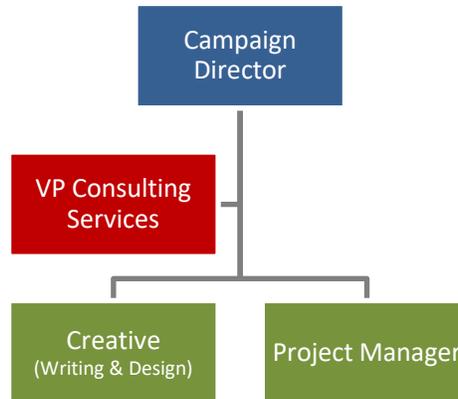
enhance their strategic outcomes. He has extensive experience across diverse nonprofit sectors in community relations, fundraising, leadership development, human resources, operations, and planning. His past posts have included senior administrative and adjunct professor roles at Marquette University and Syracuse University. Most recently, he has served as a Loaned Executive for Milwaukee’s United Performing Arts Fund and the United Way of Greater Milwaukee and Waukesha County. He was honored as the Loaned Executive of the Year for United Way for his exemplary work with nearly ninety non-profit organizations. His record of civic engagement is similarly broad. He is a member of the cabinet for United Way and serves as a board member for Global Brigades in Seattle, WA and locally for In Tandem Theater and has been active in many other local non-profit organizations.

Dr. Peters received his B.S. and M.B.A. from Southern Illinois University and his Ph.D. in Educational Policy and Leadership from Marquette University. He is recently married and now lives in Oconomowoc with his wife, Dr. Mary Kay Ellis. He enjoys biking, swimming, cross-country skiing, and many other outdoor activities.

Client references are listed later in the proposal. For more information about McDonald Schaefer please visit our website at [mcdonaldschaefers.com](http://mcdonaldschaefers.com).

**Team Strength**

One of McDonald Schaefer’s strengths is how we will resource your campaign. Depending on the service option you choose, we will assign a team including one or more of the following competencies:



By assigning expert team members to support the campaign, we ensure several campaign priorities are progressing simultaneously. Our executive leadership team, including Dave Malone (President) and Andrea Speth (Vice-President) will oversee the process. Our experienced Campaign Director will provide primary services and will be supported by an experienced team of project management and creative professionals.

## Capital Campaign Management Services

For over 20 years, McDonald Schaefer has planned, tested and directed successful capital and endowment campaigns for hundreds of millions of dollars. By applying best practices and a wealth of experience, we will develop and manage a detailed plan for your campaign and serve as Campaign Directors, overseeing the effective implementation of the plan and ensuring steady progress. As Campaign Directors, we work in partnership with your organization’s staff and volunteer leadership, providing comprehensive campaign services that keep your campaign moving forward toward its goal.

To use an analogy, we are something like the football quarterback on the field, calling the plays and managing the game. Another apt analogy is a symphony conductor who sees the entire musical score before us and sets the tempo for the performance, queuing the right musicians at the right time and keeping everyone moving together in harmony. In each of these analogies, successful outcomes depend on a team of people working together toward common goals and objectives; the same is true of capital campaigns.

Your campaign will generally follow this sequence:



Depending on the type of engagement, as Campaign Directors, McDonald Schaefer will:

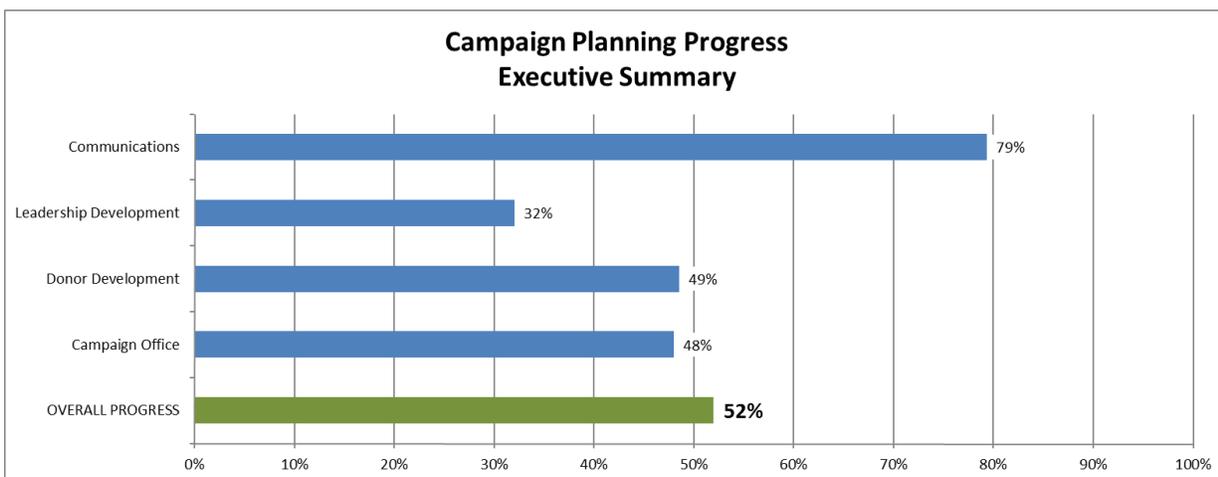
- **Work** directly with staff to manage internal campaign objectives.
- **Meet** regularly with board and campaign cabinet members individually to support their work cultivating prospects, soliciting gifts and stewarding donors.
- **Write and produce** a substantial amount of campaign communications pieces including: letters, master grant, website content, videos, progress reports and more.
- **Integrate** prospect research into outreach strategies to ensure our cabinet is equipped with the right information and to ensure the maximum outcomes for gifts.
- **Track** all campaign movement in our custom database that produces management reports used daily to advance hundreds of campaign moves simultaneously.
- **Develop** report formats and frequencies for keeping key team members apprised of progress, and regularly produce and distribute such reports. These include: campaign progress reports for the board, cabinet and staff; eNewsletters; and Campaign Flash emails that are sent periodically to announce important developments, such as when major gifts are received or major campaign benchmarks are achieved.
- **Plan and manage** various special events related to the campaign such as key cultivation events, the public campaign kickoff and groundbreaking ceremonies.

## Innovative Campaign Management

Through years of directing successful capital campaigns, we have developed a proprietary and comprehensive campaign management system called TABS<sup>®</sup>, for Task Assurance Benchmarking System. TABS<sup>®</sup> integrates several innovative tools we have designed for effective campaign management.

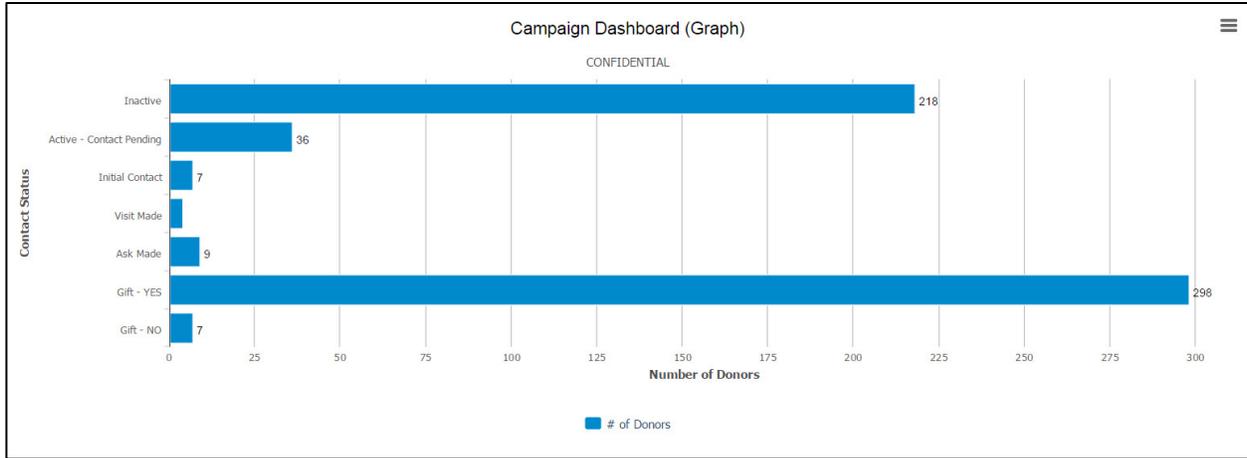
### Campaign Planning

During the all-important planning phase, TABS<sup>®</sup> ensures that each important campaign variable and the many moving parts of a capital campaign are working together to achieve the best result. Integrated into project management software, TABS<sup>®</sup> maps the entire campaign plan and schedule and regularly compares actual campaign progress against established performance benchmarks.



### Campaign Management

An important component of TABS<sup>®</sup> is our campaign management database that tracks and manages a substantial amount of donor data, as well as all significant donor contact and produces key management reports vital to volunteer involvement and donor engagement.



CONFIDENTIAL  
Status of all Active Prospects - Sorted by Status

10 Donors (Do not print on reports is not 'I' AND ...)

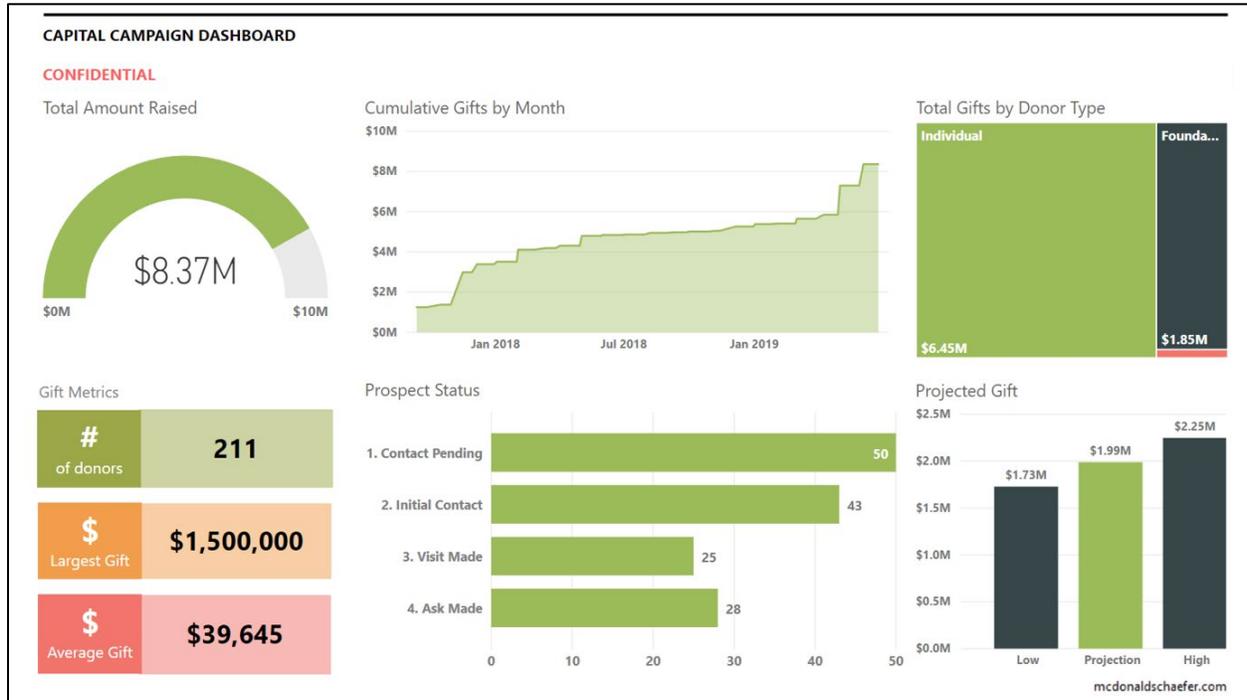
| Donor Name                                 | Solicitor 1    | Low         | High      | Projection | Ask       | Contact Pending | Initial Contact | Visit Made | Ask Made | Gift Decision |
|--|----------------|-------------|-----------|------------|-----------|-----------------|-----------------|------------|----------|---------------|
| <b>Ask Made (1 Donor)</b>                  |                |             |           |            |           |                 |                 |            |          |               |
| Nelson, Jordy                              | Devine, Dan    | \$100,000   | \$250,000 | \$175,000  | \$100,000 | ●               | ●               | ●          | ●        |               |
| TOT  |                | \$100,000   | \$250,000 | \$175,000  | \$100,000 |                 |                 |            |          |               |
| <b>Visit Made (3 Donors)</b>               |                |             |           |            |           |                 |                 |            |          |               |
| Abbrederis, Jared                          | McCarthy, Mike | \$5,000     | \$10,000  | \$7,500    | \$10,000  | ●               | ●               | ●          |          |               |
| Adams, Davante                             | McCarthy, Mike | \$75,000    | \$100,000 | \$87,500   | \$100,000 | ●               | ●               | ●          |          |               |
| Matthews, Clay                             | Svenson, Chad  | \$100,000   | \$250,000 | \$175,000  | \$250,000 | ●               | ●               | ●          |          |               |
| TOT  |                | \$190,000   | \$360,000 | \$270,000  | \$360,000 |                 |                 |            |          |               |
| <b>Initial Contact (3 Donors)</b>          |                |             |           |            |           |                 |                 |            |          |               |
| Cobb, Randall                              | Devine, Dan    | \$10,000    | \$25,000  | \$17,500   | \$25,000  | ●               | ●               |            |          |               |
| Janis, Jeff                                | Favre, Brett   | \$1,000     | \$2,500   | \$1,750    | \$2,500   | ●               | ●               |            |          |               |
| Starks, James                              | McCarthy, Mike | \$50,000    | \$100,000 | \$75,000   | \$75,000  | ●               | ●               |            |          |               |
| TOT  |                | \$61,000    | \$127,500 | \$94,250   | \$102,500 |                 |                 |            |          |               |
| <b>Active - Contact Pending (3 Donors)</b> |                |             |           |            |           |                 |                 |            |          |               |
| Jones, James                               | Favre, Brett   | \$500,000   | \$750,000 | \$625,000  | \$500,000 | ●               |                 |            |          |               |
| Lacy, Eddie                                | McCarthy, Mike | \$10,000    |           |            |           |                 |                 |            |          |               |
| Rodgers, Aaron                             | Favre, Brett   | \$150,000   |           |            |           |                 |                 |            |          |               |
| TOT  |                | \$660,000   |           |            |           |                 |                 |            |          |               |
| TOT  |                | \$1,001,000 |           |            |           |                 |                 |            |          |               |

Grouped by Projected Gift in \$100,000 increments

| TOTALS            |                        |                  |             |              |              |             |
|-------------------|------------------------|------------------|-------------|--------------|--------------|-------------|
|                   | Projection             | Number of Donors | Low         | High         | Projection   | Ask         |
|                   |                        | Graph            | Graph       | Graph        | Graph        | Graph       |
| DETAILS           | 1,000,000 to 1,100,000 | 1                | \$100,000   | \$2,000,000  | \$1,050,000  | \$2,000,000 |
| DETAILS           | 900,000 to 1,000,000   | 1                | \$500,000   | \$1,000,000  | \$911,228    | \$0         |
| DETAILS           | 700,000 to 800,000     | 1                | \$500,000   | \$1,000,000  | \$750,000    | \$500,000   |
| DETAILS           | 600,000 to 700,000     | 1                | \$500,000   | \$750,000    | \$625,000    | \$500,000   |
| DETAILS           | 500,000 to 600,000     | 3                | \$130,000   | \$3,000,000  | \$1,565,000  | \$750,000   |
| DETAILS           | 300,000 to 400,000     | 2                | \$350,000   | \$1,000,000  | \$675,000    | \$1,100,000 |
| DETAILS           | 200,000 to 300,000     | 7                | \$201,250   | \$3,241,670  | \$1,721,460  | \$750,000   |
| DETAILS           | 100,000 to 200,000     | 38               | \$1,540,250 | \$9,232,499  | \$5,080,531  | \$1,379,000 |
| DETAILS           | 0 to 100,000           | 926              | \$2,045,092 | \$7,805,410  | \$4,717,705  | \$2,638,600 |
| Totals (9 groups) |                        | 980              | \$5,866,592 | \$29,029,579 | \$17,095,924 | \$9,617,600 |

### Campaign Performance

The TABS® Digital Campaign Dashboard provides your leadership team with a simple visual presentation of the major campaign metrics in real-time, right from your computer. This one-page summary of key variables gives a snapshot of the campaign’s status and health.



### Scope of Services

McDonald Schaefer will develop a comprehensive plan that focuses on known campaign priorities. Having planned, tested and managed several multimillion-dollar capital campaigns, we know the four fundamentals common to successful campaigns:

1. **Communications**
2. **Bold leadership**
3. **Committed major donors**
4. **Campaign infrastructure**

McDonald Schaefer can serve in different capacities, ranging from **Campaign Director**, where our campaign management team provides day-to-day, hands-on management of the campaign, to **Campaign Advisor** who provides high-level strategic direction, helps establish performance benchmarks, sets current priorities, develops important strategies and regularly monitors campaign progress while your organization’s staff execute the campaign plan.

To afford our clients the best match for their needs, we offer three levels of service as detailed in the Scope of Services in Appendix A.

**Please see Appendix A to review Scope of Service options.**

## Fees

The overall expense of fundraising for a major capital campaign commonly runs in the range of 5% - 15% of the campaign goal. This includes fees for professional campaign management and other campaign-related expenses such as brochures, direct mail, campaign website, special events, etc. Due to efficiencies and economies of scale, costs as a percent of the goal tend to be higher for campaigns with smaller goals and lower for campaigns with larger goals.

McDonald Schaefer fees include a team of campaign specialists including most notably our Vice President, a Campaign Director, Creative and a Project Manager, as well as the involvement of other relevant team members as needed.

Fees for professional fundraising services are among several fees for projects of this nature such as architectural fees, engineering fees, contractor fees, banking fees, legal fees, realtor fees, etc. It is a common and accepted practice to add the cost of fundraising to the campaign goal as a legitimate project cost.

**Please see Appendix A to review Fee options.**

### Expedited Services Option

For clients who have time to conduct their campaign on timelines that are normal and customary, our regular Services and Fees will apply. Clients who have shorter, more urgent timelines may request Expedited Services should they desire accelerated progress on their project. With Expedited Services, we devote 25%-50% more concentrated time and resources to your campaign, completing campaign planning more quickly and focusing on raising gift income sooner. Expedited Services are subject to the availability of McDonald Schaefer staff and fees are 25%-75% above standard fees, commensurate with the level of increased services you choose.

### Good-faith Estimate

These fees are a good faith estimate of the work that will be required for your campaign; we believe they are accurate and reliable. However, if significantly less or more time is needed to help you achieve your goals, due to circumstances unknown to us now or that may develop during the course of our working relationship, we will notify you that an adjustment may be needed and will discuss a mutually agreeable fee adjustment.

### Contract Conclusion

If the campaign goal should be met ahead of schedule, the agreement for campaign management services will conclude early and no further fees will be required, other than fees for the month of termination. If it should take longer than anticipated to meet the campaign goal, McDonald Schaefer's involvement may be extended under the original terms or new terms agreed upon by both parties at that time. Either party may terminate the agreement without cause with 30 days' written notice.

### Reimbursable Travel Expenses

Reimbursable travel expenses include:

- Mileage billed at the then current IRS mileage reimbursement rate
- If long distance travel is required for the campaign (such as to visit a distant donor prospect or campaign leader) more than 60 miles outside of your community, reimbursable expenses may include mileage, airfare, lodging, car rental and meals. Such expenses are subject to your approval.

Virtual meetings can reduce travel expenses.

Expenses are billed at cost, subject to your approval, and submitted monthly.

### Excluded Services

McDonald Schaefer will participate in developing concepts for many of the important campaign tools listed below, but the cost to produce these items is a campaign expense and the responsibility of the client:

- Website development
- Video design and production
- Grant writing
- Printing of campaign promotional materials (e.g. case for support, stationery, folders, note cards, envelopes, etc.)
- Direct mail processing (e.g. mailing list, mail house services and postage)
- Signage (e.g. promotional campaign signage and donor recognition signage)
- Special events
- Digital marketing (e.g. banner advertising, email fundraising, etc.)
- Print and broadcast marketing, if any

### Valid For

This proposal is valid for 30 days and is thereafter subject to change.

### Recorded Webinar

To view an informative 30-minute webinar about the Capital Campaign experience, please visit our [free resource page](#).

**Scope of Services Options**

This Scope of Services table summarizes the major steps in planning and running a capital campaign and outlines an initial division of tasks between McDonald Schaefer and our clients based on the Option selected. The Options are flexible to allow you to tailor our services to your particular needs and we may jointly elect to move some of the tasks from one column to another. Note that this list summarizes broad topics and clients should cautiously consider the "right" option for them as many of these steps involve dozens of related substeps and require extensive experience, time, and resources.

| <b>Scope of Services OPTIONS</b>  |   | <b>1</b>                                 |  | <b>2</b>                               |   | <b>3</b>                               |  |
|---|---|--|--|--|---|--|--|
|   |   | <b>Campaign Director</b><br>\$11,900/mo. |  | <b>Campaign Manager</b><br>\$8,900/mo. |   | <b>Campaign Advisor</b><br>\$5,900/mo. |  |
| <b>Task</b>   |  <b>MS</b> | <b>Client</b>                            |  <b>MS</b> | <b>Client</b>                          |  <b>MS</b> | <b>Client</b>                          |  |
| <b>CAMPAIGN LEADERSHIP</b>  |   |  |  |  |   |  |  |
| 1 Define the role of volunteer campaign leadership  | ✓   | ✓  | ✓  | ✓                                      | ✓   | ✓                                      |  |
| 2 Develop job descriptions for all leadership positions   | ✓   |  | ✓  |  | ✓   |  |  |
| 3 Develop leadership profile  | ✓   |  | ✓  |  | ✓   |  |  |
| 4 Define Cabinet hierarchy  | ✓   |  | ✓  |  | ✓   |  |  |
| 5 Identify leadership candidates  | ✓   | ✓  | ✓ <sup>-</sup>   | ✓ <sup>+</sup>                         |   | ✓                                      |  |
| 6 Research (internal/external) leadership candidates  | ✓   |  | ✓  |  |   | ✓ <sup>*</sup>                         |  |
| 7 Evaluate leadership candidates  | ✓   | ✓  | ✓  | ✓                                      | ✓   | ✓                                      |  |
| 8 Prioritize list of candidates   | ✓   | ✓  | ✓  | ✓                                      | ✓   | ✓                                      |  |
| 9 Develop personal recruitment strategies   | ✓   | ✓  | ✓  | ✓                                      | ✓   | ✓                                      |  |
| 10 Develop recruitment materials/tools  | ✓   |  | ✓  |  |   | ✓ <sup>*</sup>                         |  |
| 11 Recruit Honorary Chair(s), Working Chair(s), regular cabinet members   | ✓   | ✓  | ✓ <sup>-</sup>   | ✓ <sup>+</sup>                         |   | ✓                                      |  |
| 12 Develop cabinet orientation and training materials   | ✓   |  | ✓  |  | ✓ <sup>-</sup>  | ✓ <sup>+</sup>                         |  |
| 13 Conduct Relationship Mapping exercise to link cabinet members and donor prospects  | ✓   |  | ✓  |  | ✓   |  |  |
| 14 Provide group cabinet orientation and asking training for board, campaign cabinet and staff  | ✓   |  | ✓  |  | ✓   |  |  |
| 15 Provide one-on-one follow up training sessions after group session   | ✓   |  | ✓  |  |   | ✓ <sup>*</sup>                         |  |
| 16 Meet regularly with board and campaign cabinet members individually to support their work engaging prospects, asking for gifts and stewarding donors | ✓   |  | ✓  |  | ✓   | ✓                                      |  |
| 17 Frequently update leadership team on campaign status and progress  | ✓   |  | ✓  | ✓                                      |   | ✓ <sup>*</sup>                         |  |

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

| <b>Scope of Services <i>OPTIONS</i></b> |   | <b>1</b>   |        | <b>2</b>  |        | <b>3</b>   |        |
|---|---|--|--------|---|--------|--|--------|
|   |   | Campaign Director<br>\$11,900/mo.  |        | Campaign Manager<br>\$8,900/mo.   |        | Campaign Advisor<br>\$5,900/mo.  |        |
| <b>Task</b>                             |   |  MS | Client |  MS | Client |  MS | Client |
| 18                                      | <b>MAJOR DONOR DEVELOPMENT</b>  |  |        |   |        |  |        |
| 19                                      | Develop gift chart  | ✓  |        | ✓   |        | ✓  |        |
| 20                                      | Segment prospect list into tiers and recommend different engagement and asking strategies   | ✓  |        | ✓   |        | ✓  |        |
| 21                                      | Compile initial prospect list based on the organization's contacts, feasibility study results, and leads from new sources   | ✓  | ✓      | ✓   | ✓      |  | ✓*     |
| 22                                      | Conduct wealth screening and analytics for up to 2,500 prospects  | ✓  |        | ✓   |        | ✓  |        |
| 23                                      | Conduct research for selected top donors per a defined budget proportionate to selected Scope of Services   | ✓  |        | ✓   |        | ✓  |        |
| 24                                      | Conduct ongoing basic research for additional prospective donors  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 25                                      | Conduct rating sessions with leadership team to evaluate donor prospects  | ✓  |        | ✓   |        | ✓  | ✓      |
| 26                                      | Develop Schedule of Asks by qualifying and prioritizing prospects based on projected gift, ask readiness and personal connections to prospect   | ✓  | ✓      | ✓   | ✓      | ✓  | ✓      |
| 27                                      | Assign major prospects to members of the leadership team  | ✓  | ✓      | ✓   | ✓      | ✓  | ✓      |
| 28                                      | Develop personalized engagement & asking strategies for lead gift prospects   | ✓  | ✓      | ✓   | ✓      | ✓  | ✓      |
| 29                                      | Develop personalized engagement & asking strategies for other major gift prospects for duration of campaign   | ✓  | ✓      | ✓   | ✓      | ✓  | ✓      |
| 30                                      | Lead the active asking stage and serve as the driving force by coordinating engagement & asking strategies with leadership team throughout the campaign and serving as primary contact for campaign cabinet | ✓  |        | ✓   |        | ✓  | ✓      |
| 31                                      | Accompany volunteers on selected asking calls when necessary  | ✓  | ✓      | ✓-  | ✓+     |  | ✓      |

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

| <b>Scope of Services <i>OPTIONS</i></b>   |   | <b>1</b><br>Campaign Director<br>\$11,900/mo. |  | <b>2</b><br>Campaign Manager<br>\$8,900/mo. |   | <b>3</b><br>Campaign Advisor<br>\$5,900/mo. |  |
|---|---|---|--|---|---|---|--|
| <b>Task</b>   |  <b>MS</b> | <b>Client</b>                                 |  <b>MS</b> | <b>Client</b>                               |  <b>MS</b> | <b>Client</b>                               |  |
| 32 <b>COMMUNICATIONS</b>  |   |   |  |   |   |   |  |
| 33 Develop campaign theme and tagline   | ✓   | ✓   | ✓  | ✓   |   | ✓*  |  |
| 34 Write communications pieces per a defined budget proportionate to selected scope of services   | ✓   | ✓   | ✓  | ✓   |   | ✓*  |  |
| 35 Design campaign logo, case statement, small brochure, stationery, envelopes, folders, notecards per a defined budget proportionate to selected scope of services | ✓   | ✓   | ✓  | ✓   |   | ✓*  |  |
| 36 Develop gift/pledge form   | ✓   |   | ✓  |   |   | ✓*  |  |
| 37 Define Giving Levels   | ✓   |   | ✓  |   |   | ✓*  |  |
| 38 Recommend/Develop Named Gift Opportunities   | ✓   |   | ✓  | ✓   | ✓-  | ✓+  |  |
| 39 Define on-site recognition program   | ✓   | ✓   | ✓  | ✓   |   | ✓*  |  |
| 40 Develop digital & multimedia campaign strategies (does not included finished products) including:  |   |   |  |   |   |   |  |
| 41 Campaign website   | ✓   |   | ✓  |   | ✓-  | ✓+  |  |
| 42 Campaign eNewsletter   | ✓   |   | ✓  |   | ✓-  | ✓+  |  |
| 43 Campaign video   | ✓   |   | ✓  |   | ✓-  | ✓+  |  |
| 44 Social media tools   | ✓   |   | ✓  |   | ✓-  | ✓+  |  |
| 45 Develop press network strategy   | ✓   |   | ✓  | ✓   |   | ✓*  |  |
| 46 Develop on-site signage strategy   | ✓   |   | ✓  | ✓   |   | ✓*  |  |
| 47 Develop other campaign promotional materials   | ✓   |   | ✓  | ✓   |   | ✓*  |  |
| 48 Develop comprehensive direct mail strategy   | ✓   |   | ✓  | ✓   | ✓-  | ✓+  |  |
| 49 Develop a PowerPoint presentation  | ✓   |   | ✓  |   |   | ✓*  |  |
| 50 Prepare press kits   | ✓   |   | ✓  |   |   | ✓*  |  |
| 51 Write a master foundation inquiry and proposal   | ✓   |   | ✓  |   | ✓   |   |  |
| 52 Grant-writing  |   | ✓   |  | ✓   |   | ✓   |  |
| 53 Prepare numerous campaign-related documents (letters, proposals, follow ups, etc.), ready for signature, for various volunteers and staff                        | ✓   |   | ✓  | ✓   | ✓-  | ✓+  |  |
| 54 Plan special events (campaign kickoff, groundbreaking event, grand opening), promotions and public outreach  | ✓   | ✓   | ✓  | ✓   |   | ✓*  |  |
| 55 Write special event scripting  | ✓   |   | ✓  | ✓   |   | ✓*  |  |
| 56 Develop concepts for special event graphics (programs, easel displays, PowerPoint)   | ✓   |   | ✓  |   |   | ✓*  |  |
| 57 Develop stewardship communication strategies   | ✓   |   | ✓  | ✓   |   | ✓*  |  |

\* McDonald Schaefer to provide guidance and/or samples.

+/- A plus sign indicates primary responsibility; a minus sign indicates secondary responsibility

| Scope of Services <i>OPTIONS</i>   | 1<br>Campaign Director<br>\$11,900/mo.   |        | 2<br>Campaign Manager<br>\$8,900/mo.  |        | 3<br>Campaign Advisor<br>\$5,900/mo.   |        |
|--|--|--------|---|--------|--|--------|
|  |  MS | Client |  MS | Client |  MS | Client |
| 58 <b>CAMPAIGN OFFICE</b>  |  |        |   |        |  |        |
| 59 Develop comprehensive campaign plan   | ✓  |        | ✓   |        | ✓  |        |
| 60 Update or develop Gift Acceptance policy  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 61 Update or develop Deferred Gift policy  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 62 Update or develop Named Gift policy   | ✓  |        | ✓   | ✓      |  | ✓*     |
| 63 Confirm or develop Stock Transfer Instruction Sheet   | ✓  |        | ✓   |        |  | ✓*     |
| 64 Develop tiered gift acknowledgement plan  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 65 Develop pledge reminder system  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 66 Develop named gift system tracking system   | ✓  |        | ✓   |        |  | ✓*     |
| 67 Schedule recurring group and one-on-one meetings with cabinet members   | ✓  |        | ✓   | ✓      |  | ✓*     |
| 68 Coordinate direct mail campaign with mail house   | ✓  |        | ✓   | ✓      |  | ✓*     |
| 69 Prepare documents for campaign meetings including agendas, timelines, gift reports, forecasts, etc.                                   | ✓  |        | ✓   | ✓      |  | ✓*     |
| 70 Develop personalized proposals for individual donors when needed  | ✓  |        | ✓   | ✓      |  | ✓*     |
| 71 Track all prospect data and moves management in campaign database   | ✓  |        | ✓   |        | ✓  |        |
| 72 Provide grant research  | ✓  |        | ✓   |        | ✓  |        |
| 73 Store and manage inventory of campaign promotional materials  |  | ✓      |   | ✓      |  | ✓      |
| 74 Routinely assemble campaign materials into campaign folders, ready for use by campaign volunteers                                     |  | ✓      |   | ✓      |  | ✓      |
| 75 Coordinate campaign special events (engagement events/receptions, public campaign announcement, groundbreaking, campaign celebration) |  | ✓*     |   | ✓*     |  | ✓*     |
| 76 Manage production of campaign newsletter and/or other identified communication tools  |  | ✓*     |   | ✓*     |  | ✓*     |
| 77 Record gifts, acknowledge donors, notify involved team leaders  |  | ✓      |   | ✓      |  | ✓      |
| 78 Track pledges, issue reminders when due   |  | ✓      |   | ✓      |  | ✓      |
| 79 Maintain campaign website, social media channels and other digital applications   |  | ✓      |   | ✓      |  | ✓      |

\* McDonald Schaefer to provide guidance and/or samples.

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# 08

## APPENDIX B: COI





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
04/10/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

|   |                |   |                |
|---|----------------|---|----------------|
| PRODUCER<br>Holmes Murphy & Assoc - WI<br>1600 Aspen Commons Suite 990<br>Middleton, WI 53562 | 1-800-527-9049 | CONTACT NAME: Paula Dixon<br>PHONE (A/C No. Ext): 800-527-9049<br>E-MAIL ADDRESS: | FAX (A/C, No): |
| INSURED<br>Ramaker & Associates, Inc.<br>855 Community Drive<br>Sauk City, WI 53583           |                | INSURER(S) AFFORDING COVERAGE   |                |
|   |                | INSURER A: CONTINENTAL CAS CO   | NAIC # 20443   |
|   |                | INSURER B: CONTINENTAL INS CO   | 35289          |
|   |                | INSURER C: TRAVELERS IND CO OF CT   | 25682          |
|   |                | INSURER D:  |                |
|   |                | INSURER E:  |                |
|   |                | INSURER F:  |                |

**COVERAGES**

CERTIFICATE NUMBER: 59034349

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE  | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS  |
|----------|--|-----------|----------|---------------|-------------------------|-------------------------|---|
| A        | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC<br>OTHER: |           |          | 6057545905    | 04/16/20                | 04/16/21                | EACH OCCURRENCE \$ 1,000,000<br>DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000<br>MED EXP (Any one person) \$ 15,000<br>PERSONAL & ADV INJURY \$ 1,000,000<br>GENERAL AGGREGATE \$ 2,000,000<br>PRODUCTS - COMP/OP AGG \$ 2,000,000<br>\$ |
| B        | <input checked="" type="checkbox"/> AUTOMOBILE LIABILITY<br><input checked="" type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY                |           |          | 6057545872    | 04/16/20                | 04/16/21                | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000<br>BODILY INJURY (Per person) \$<br>BODILY INJURY (Per accident) \$<br>PROPERTY DAMAGE (Per accident) \$<br>\$   |
| B        | <input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR<br><input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$   |           |          | 6057545886    | 04/16/20                | 04/16/21                | EACH OCCURRENCE \$ 8,000,000<br>AGGREGATE \$ 8,000,000<br>\$  |
| C        | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below   |           | N/A      | UB3N669422    | 04/16/20                | 04/16/21                | <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER<br>E.L. EACH ACCIDENT \$ 1,000,000<br>E.L. DISEASE - EA EMPLOYEE \$ 1,000,000<br>E.L. DISEASE - POLICY LIMIT \$ 1,000,000                                       |
| A        | Professional Liability<br>Claims Made  |           |          | AEH591908924  | 04/16/20                | 04/16/21                | Each Claim 3,000,000<br>Aggregate 3,000,000   |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

|                       |  |
|-----------------------|--|
| For Proposal Purposes | SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|                       | AUTHORIZED REPRESENTATIVE<br><br><i>Paula Dixon</i>  |

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ACORD 25 (2016/03)

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rjustwi  
59034349



**THANK  
YOU!**

FOR YOUR CONSIDERATION



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Sauk City, WI 53583  
(608) 643-4100  
[www.ramaker.com](http://www.ramaker.com)