



**BISHOP LYNCH
HIGH SCHOOL**

REQUEST FOR PROPOSAL Capital Campaign Feasibility Study

1.1 PURPOSE & ORGANIZATIONAL BACKGROUND

Purpose

Bishop Lynch High School seeks proposals from qualified fundraising consultants to conduct a feasibility study of an estimated \$25 to \$35 million dollar campaign for the further development and enhancement of the athletic complexes with an additional significant endowment goal. The study should determine how much capital can realistically be raised and the timing of the potential campaign in respect to when a campaign should be launched as well as the proposed duration of said campaign.

Organizational Background

Located on 22 acres in Northeast Dallas, and surrounded by historic neighborhoods and distinguished landmarks, Bishop Lynch High School is a Catholic, co-educational college preparatory institution founded by the Dominican Order providing a well-rounded education for students in grades nine through twelve. Established in the early 1960's, on the far eastern side of Dallas, a few enterprising parish pastors and parents founded this high school intended to serve a wide diversity of student learners – budding scholars and those with learning differences, athletes and thespians. All who sought truth and knowledge were welcomed. From this early vision has grown a truly outstanding Catholic educational institution. Twice awarded the U.S. Department of Education's Blue Ribbon Award for Excellence, Bishop Lynch High School now stands shoulder to shoulder with the very best private schools serving the youth of Dallas and its suburban communities. As a strong, highly respected college preparatory school with some 11,000 alumni dating back to 1966, Bishop Lynch High School is now blessed with an enrollment of nearly 1,050 students from more than 90 zip codes in the Dallas-Fort Worth Metroplex, balanced budgets, beautiful and expansive facilities, enthusiastic parents, talented faculty and staff, and alumni who are coming of age and success to play a growing philanthropic role in support of the school. With more than \$30M invested throughout its impressive campus in recent years, Bishop Lynch students enjoy 21st Century learning and supporting facilities that are hard to find anywhere, at any price.

1.2 OBJECTIVE AND DELIVERABLES

Objectives of the Feasibility Study

The consultant's primary deliverable is a feasibility study outlining Bishop Lynch High School's short- and long-term philanthropic goals and long-term opportunities for financial success. Specifically, the feasibility study should address the following key areas:

- **Ascertain timing for proposed campaign.** With Bishop Lynch recently completing \$30 million in renovations, guidance as to how long to wait to launch the next campaign is a critical component of the feasibility study. Concern for donor fatigue must be considered as well as keeping donor momentum.

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- **Test basic planning assumptions with potential donors.** Find out how potential donors feel about the proposed campaign. Do potential donors see the improvement to the athletic complexes and growing the endowment as important enough to place on their priority giving list?
- **Expand potential prospect list.** Develop the optimal funding mix of lead donors, major donors, private foundations, and, if necessary, direct-mail public solicitations.
- **Ascertain potential support.** Through ongoing interviews and knowledge of the Advancement Committee and Advancement staff's solicitation capabilities, the consultant will provide a realistic estimate for potential campaign success. The consultant will determine if there are enough donor prospects, and enough prospects at different giving levels, to reach the recommended goal.
- **Identify volunteer leadership potential.** Interview potential campaign leaders and civic, business, cultural, and other community leaders who may be willing to serve as a leader. Identify board leadership and their fundraising capabilities. Assess what it will take to recruit volunteer leadership.
- **Set a realistic campaign goal.** Currently, the total project cost has been established as a range between \$25-\$35 million. Additionally, Bishop Lynch High School is considering a \$6 million endowment goal as a part of the campaign.
- **Determine campaign strategies.** Identify strengths, weaknesses, and a prognosis for success/inability to reach recommended goal. Make proposal for successful implementation.
- **Develop a fundraising plan for soliciting individual prospects.** Information developed in the confidential interviews with the consultant will be used to develop an appropriate solicitation plan, giving level(s) and fundraising schedule (including potential in-kind gifts).
- **Prepare written report/fundraising plan.** The completion of the feasibility study will be a written report that synthesizes the findings from the confidential interviews, and the consultant's recommendations for conducting a successful capital campaign.

Deliverables

- **Situation Analysis.** Establish foundation of assets, challenges, opportunities and threats related to campaign, based on (e.g.):
 - Stakeholder research (interviews, surveys, audience mapping, etc.)
 - Materials review
 - Infrastructure audit
 - Peer competitor review/environmental scan
- **Case for Support.** Develop foundational document and appropriate supporting documents to guide philanthropic strategy for campaign.
- **Donor Prospect List, Volunteer Leadership Prospect List, Top Prospects for Both.** Identify most promising prospects for capital campaign donors and volunteer leadership.
- **Campaign Plan.** Develop a capital campaign plan that includes clarified goals (dollars raised, timeframe, donor distribution); milestones (date specific objectives for dollars raised, plus supporting benchmarks-volunteers recruited, prospects cultivated, solicitations), prioritized donor segments; recommended key cultivation and solicitation strategies and supporting tactics: specifications for campaign tools; budget and timeline; and recommended evaluation methods.

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- **Campaign Implementation Counsel.** Provide strategic counsel throughout capital campaign planning, launch, implementation, evaluation, and refinement. Activities may include: driving implementation of the strategy, facilitating the most effective use of staff and volunteer resources, preparing coaching and supporting staff and volunteer solicitors, conducting direct cultivation and solicitation of prospects where appropriate, developing and/or editing proposals, updates and other campaign materials, advising on campaign communication and serving as a strategic partner to the campaign's leadership.
- **OPTIONAL: Campaign Identity & Presentation Tool Templates.** Establish brand and visual identity for campaign; develop campaign tools.

1.3 PROPOSAL REQUIREMENTS & SCHEDULE

Proposal Requirements

Please address the following topics in order in a proposal of ten pages or less. You may submit additional information on your firm, but only the proposal itself will be submitted initially to the Selection Committee. Other material will be supplied at their request.

- Project Understanding.
- Project Approach including significant phases and deliverables. (i.e, describe your feasibility study process. Include the duties you perform and those you expect to be done by the client staff or leadership. What information and recommendations will be included in the Feasibility Study Report? What components are included in the campaign plan?)
- Project timeline.
- Estimate of fees and expenses for feasibility study.
- Estimate of fees and expenses for ongoing campaign counsel, should your firm be awarded the feasibility study project.
- Firm capabilities:
 - experience with similar organizations and capital campaign projects
 - experience with feasibility studies and fundraising plans
 - experience in working with private schools
- Project team.
- References:
 - Please list the campaigns you have completed in the past three years, the goal of each and the amount raised for each. (If this information will extend your proposal beyond the ten page limit, simply list as many projects as possible in the allotted space, focusing on those most similar to Bishop Lynch.)
 - For each campaign completed in the past three years, please list the name, title and phone number of the senior staff person with whom you worked.



**BISHOP LYNCH
HIGH SCHOOL**

- Are you presently doing any other fundraising campaigns or consulting work in Texas? If so, where?

Estimated Schedule

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| ▪ Issue Request for Proposals | September 1, 2017 |
| ▪ Questions/Clarifications Due | September 22, 2017 |
| ▪ Responses and Answers Provided by | October 2, 2017 |
| ▪ Proposals due | October 16, 2017 |
| ▪ Evaluation of proposals | |
| ▪ Interviews conducted with finalists | November 1 – 6, 2017 |
| ▪ Announce decision and send notification | November 10, 2017 |
| ▪ Finalize contract | November 30, 2017 |
| ▪ Begin Feasibility Study | December 1, 2017 |

Bishop Lynch High School reserves the right to revise the above schedule.

Proposals are due no later than the close of business on October 16, 2017 to:

Brynn Bruno
Vice President for Institutional Advancement
Bishop Lynch High School
9750 Ferguson Road
Dallas, Texas 75228
(214) 324-3607 ext 4140
Electronic proposals will be accepted at Brynn.Bruno@bishoplynch.org

We thank you in advance for reviewing this RFP, and look forward to reviewing your proposal.

Sincerely,

Christopher L. Rebuck
President
Bishop Lynch High School