



Request for Proposal (RFP):

Consultant for an Admissions & Membership Pricing Study for the Chicago Botanic Garden

Issue Date:

November 13, 2017

Proposal Submission Deadline:

December 4, 2017

Contact Name for Proposal Delivery and Questions:

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I. INTRODUCTION

You have been selected by the Chicago Botanic Garden (“Garden”) to submit a proposal for consulting services related to the development, impact, and implementation of a per person admissions fee for entry to the Chicago Botanic Garden. The overall goal is to maximize revenues across multiple lines of business at the Garden, while ensuring the public’s loyalty to the Garden’s brand.

The Garden has designed this process to evaluate potential suppliers and select the one most capable of providing consulting on the comprehensive nature of this new method of charging for entry to the Garden. The introduction of a per person admission fee has many ripple effects upon an organization, including, but not limited to, the impact on attendance in total and among various audience segments, membership fee and benefit structure, number of member households, on-site earned revenues, raised revenue, and the logistics and operations as related to the physical site and potentially online. Thus, the resulting report should include an understanding of the pricing thresholds, creation of the price per person price structure, as well as the repercussions of this new structure on other areas of the Garden.

As you will see from the questions contained in the RFP, in addition to fees, the Garden would like to receive information regarding your service capabilities, research approach, and methodology. Your timely and complete response to this RFP will allow the Garden to properly evaluate your services and cost proposal for final consultant selection in December 2017.

We greatly appreciate your investment of time to complete this RFP and look forward to your response.

II. GENERAL ORGANIZATION OVERVIEW

The Chicago Horticultural Society operates the Chicago Botanic Garden on land owned by the Forest Preserve District of Cook County in Glencoe, Illinois. The Chicago Botanic Garden opened its doors in 1972 with one display garden. Now, the 385-acre Garden features 27 display gardens and three native habitats, uniquely situated on nine islands surrounded by lakes. The Garden is one of the most-visited botanic gardens in the U.S., with over one million visitors annually. It has 51,000 member households—one of the largest memberships of any U.S. botanic garden and among the highest of the Chicago-area cultural institutions.

The Garden is located on 385 acres of Forest Preserves land. One of the few botanic gardens accredited by the American Association of Museums, the Garden is a living museum featuring 27 gardens, more than 100 acres of woodland, and 15 acres of re-created prairie habitat. The Garden’s iconic features are its 81 acres of waterways and nine islands. Miles of walking trails, paths, and bridges provide visitors with breathtaking views and vistas from which to view the Garden’s collection of 2.7 million plants.

The Board of Directors of the Society has adopted the following Mission Statement:
“We cultivate the power of plants to sustain and enrich life.”

The Garden’s annual operating budget is approximately \$37 million. For additional information, please see the “Mission and History” sheet at the end of this document.

More information regarding the Garden is available at www.chicagobotanic.org and on its Form 990 at www.guidestar.com. For more information on the Garden's 10-year strategic plan, please go to <http://strategicplan.chicagobotanic.org/>.

III. BACKGROUND

The Chicago Botanic Garden is part of the Forrest Preserves of Cook County, and as such, receives \$9.4 million in taxpayer dollars annually from the Forrest Preserves for operating support. In addition, the Garden receives an average of \$7 million annually in other federal, state, and local government grants. Overall, the 40% of the Garden's annual operating budget comes from some form of government funding. Since its opening, the Garden has had no admission fee, only a parking fee. Therefore, anyone who comes to the Garden via public transportation or by biking or walking, the experience is completely free of charge. Chicago Botanic Garden members do not pay for parking; this is membership's primary benefit. For those who pay to park, the current parking fee structure (<https://www.chicagobotanic.org/visit>) is based upon day of the week of visit, time of year and county in which you reside (Cook County residents receive a discount since the Garden is in part supported via Cook County tax dollars). Fees range from \$30 per car for non-Cook County residents on a weekend from April 1- Oct. 31, to \$20 for a Cook County resident coming any day of the week between November 1- March 31. The fee is also based on the type of vehicle (passenger vehicles, vans, buses, limos all pay different rates), and does not take into consideration the number of people are in that vehicle. So for example, a Cook County passenger vehicle with one person pays the same as a similar customer with five people in the car.

This arrangement of not charging a per person admission fee was developed when the Garden opened in 1972.

The Garden is the only cultural institution in the Chicagoland area, and probably in the United States, to have this type of pricing structure.

V. FACTS & FIGURES

The Garden is looking to create a per person pricing structure that maximizes all visitor-dependent revenues, including membership, on-site add-on attractions (i.e., tram, Model Railroad), food service and shop sales. The Garden is open to looking at a variety of pricing options, including bundled pricing which would include what are currently add-on experiences (i.e., tram, Model Railroad), as well as keeping a tiered pricing structure for Cook vs. Non- Cook County residents, whereby Cook Country residents pay less than non-Cook (as they currently do).

Over the past three years, the Garden's total attendance breakdown has been:

	2014	2015	2016
Members	584,388	584,406	599,626
Paid	234,615	246,934	261,718
Walkers/Bikers (non-paying)*	94,090	93,094	95,482
Other **	121,897	123,182	116,601
TOTAL	1,058,368	1,047,616	1,073,787

* Walkers/Bikers is calculated at 10% of the total member, non-paid, and other attendance

** Other reflected attendance from school groups, Ravinia parkers, private & corporate event attendees, etc.

In 2016, the average number of visitors in a member car was 1.94 people; it was 2.95 for non-members. As for attendance, figures for non-member, full price customers for the past three years have been as follows:

PAID VEHICLES/VISITORS	2014	2015	2016
Cook County - Vehicles	50,683	57,836	62,062
Non - Cook County - Vehicles	23,871	18,508	17,607
TOTAL	74,554	76,344	79,669
Cook County - Visitors	145,559	152,662	153,795
Non -Cook County - Visitors	89,056	94,272	107,923
TOTAL	234,615	246,934	261,718

The Garden currently has the following add-on experiences, which require an additional fee for all visitors (member receive discounted pricing, but still pay), but may have capacity constraints if offered as part of an "all access pass". Note: none of these programs runs every day of the year.

ATTRACTION	RUN DATES
The Orchid Show	Second Sunday in Feb. – last Sunday in March
Tram Tours – Grand and Bright Encounters	Late April- last Sunday in October
Model Railroad	Second Saturday in May – last Sunday in March
Butterflies & Blooms	Saturday of Memorial Day Weekend– Monday, Labor Day
Wonderland Express	Friday after Thanksgiving – First Sunday of January

The Garden has several levels of membership in which most of the Garden's members fall – Garden and Garden Plus. On average, the Garden has a 73% membership renewal rate. A full detail of the

levels, their pricing and their benefits can be found at <https://www.chicagobotanic.org/member>. Below is the 2017 breakdown of participation in the various Garden membership levels:

- Garden Level (Individuals - including educators, national) 49%
- Garden Plus (Households- including educators, national) 46%
- Donor Level (Households- \$250 and up) 4%
- Other (business, organizational, employees) 1%

The Garden out-sources both food service and retail operations to third party providers. Both contracts stipulate that the Garden must meet minimum requirements for annual attendance. This requirement is based upon the number of members and paid visitors combined that come through the gatehouse (does not include those who come via public transportation or walk or bike to the Garden). Thus, when looking at a new per person pricing structure, the revenues from these contracts and the attendance guarantees must be taken into consideration if a new per person pricing model would potentially lessen the Garden's annual attendance.

In addition, when looking at this new model, the physical layout of the campus and overall operational impact (i.e., staffing, technology) given the layout need to be taken into consideration. Currently, the Garden's physical layout is configured to take parking fees upon entry via two gatehouses with staff utilizing the Garden's ticketing system to process sales. Members have an RFID sticker in their windshield which is read by a reader (one set per gatehouse) so they do not have to stop, but rather slow as they go through the gatehouse. The RFID readers read their decal and records their entry. As they slow, gatehouse staff notes the number of people in their vehicle and records it in their record for attendance. Those who enter via foot or bike do not have any sort of "check point". While there are three main points of entry to the Garden for those not in vehicles, once in, there is no one area of throughput for all visitors like there is for those entering via a vehicle. The map shows the full layout of the Garden (<https://www.chicagobotanic.org/visit/map>).

The Garden has embarked on an 18-month audience research project that will lead to more informed decisions across the organization. The ultimate business objective is to attract a diverse group of new visitors, member and donors while retaining the existing audience and serving them in new and better ways for increased engagement and loyalty. The research plan includes: an onsite visitor survey to track visitor profile, purpose of visit and overall satisfaction; qualitative and quantitative research to gain a deep understanding of the Garden's current audience's motivations, attitudes and behaviors. This research can help supplement this scope of work.

SOLUTIONS FOR FUTURE STATE/SCOPE OF SERVICES

The selected partner will need to help the Garden determine the most effective, efficient, yet financially impactful per person admissions pricing strategy. This strategy should be developed with an understanding of the Garden's existing offerings and earned and raised revenue streams, with an outlook of what potential overall financial growth this new strategy could bring. The solution should be developed using a combination of data analytics, audience research, competitor market research, and operational reviews. A key part of evaluating a vendor will be their methodology and experience to most accurately predict real-world results of future adoption of new pricing offering for visitors and members. The analysis should be qualitative and quantitative in nature. The Chicago Botanic

Garden has strong brand identity and customer loyalty. A solution should enhance both of these, while maximizing revenues to meet the optimal value proposition for our customer.

VI. MINORITY and WOMEN OWNED BUSINESS PARTICIPATION GOALS

The Garden recognizes its responsibility to the communities which it serves and is committed to a policy of non-discrimination. It is the policy and commitment of the Garden not to discriminate on the basis of race, color, national origin, or sex in the award and performance of any Garden contract or in the administration of the Garden's Supplier Diversity Program. The Garden will take all necessary and reasonable steps to assure that minority business enterprises and women owned businesses shall have a fair opportunity to participate in Garden contracts. The Garden has established a 2017 goal for participation by certified minority and women owned businesses at 35%.

Bidders with questions on the Garden's minority and women owned businesses program should contact Beth Dunn, Director of Government Affairs and Coordinator of the Garden's Supplier Diversity Program, at (847) 835-6879 or edunn@chicagobotanic.org.

VII. RFP PROCESS

A. Response Requirements

Final responses to the Request for Proposal are due on or before 5:00 PM (CST) Monday, December 4, 2017 by electronic submission via email to: Harriet Resnick, Vice President of Visitor Experience and Business Development at hresnick@chicagobotanic.org. Please do not contact the Garden during this process, other than to submit the firm's intent to respond (via email) and any questions related to the RFP (via email), by the dates indicated in the RFP Schedule Timeline provided in the following section. The email subject line of any and all emails should read "BPR Consultant RFP".

A bidder's meeting will be held at the Chicago Botanic Garden on November 17, 2017 from 2-3pm. At this time, you are invited to come in person to get an overview of this RFP from the Garden's team and to ask questions. Upon entering the Garden, tell the Gatehouse you are here for the Pricing Study RFP Bidder's meeting and staff will direct you. This meeting will last no more than one hour.

B. RFP Schedule Timeline - Important Dates

1.	Issue date of RFP	11/13/2017
2.	Bidders meeting	11/17/2017
3.	Deadline for firms to indicate intent to respond, 5pm (CST)	11/21/2017
4.	Deadline for written questions submitted to the Garden, 5pm (CST)	11/27/2017
5.	Deadline for Proposal, 5:00 p.m. (CST)	12/4/2017
6.	Period for possible presentations	12/11-15/17
7.	Anticipated announcement of appointment(s)	12/18/2017

C. Award Criteria

Based upon responses to this RFP, some firm candidates may be invited to participate in a next-step evaluation process. Once responses have been received, they will be evaluated against selection criteria developed by the Garden. Your proposal will be evaluated both qualitatively and quantitatively. Our evaluation will be based on, among other things:

1. Overall ability to satisfy requirements, as summarized in the introduction and scope of services
2. Quality of proposal, including competitiveness and completeness of supplied pricing information
3. Breadth and depth of capability
4. Proven track record in the areas mentioned in the introduction and scope of services
5. Commitment to long-term partnership
6. Commitment to diversity
7. Pricing and fees, including a willingness to partner with the Garden. Details regarding the Garden's Corporate Partnership Programs can be found on the Garden's website at www.chicagobotanic.org.

D. Legal Disclaimers

Your firm is receiving this information as an agency/consultant firm-client communication. This RFP and the information contained in it or provided in connection with the RFP are proprietary and confidential and the firm must maintain the information in strict confidence and use it solely for preparing a formal proposal to the Garden. Your firm will not disclose the information set forth in the RFP to anyone other than your firm's members and employees who have a need to know such information. If a conflict of interest or a situation raising an appearance of divided loyalty or impropriety might arise where your firm is representing parties with adverse interest to the Garden in the matters described in the RFP, your firm agrees that no person of your firm who had access to any information contained in this RFP will represent such adverse parties or share the RFP information with the adverse parties or the attorneys representing the adverse parties. Your firm may not use the Garden's name or logo or the name or logo of any direct or indirect subsidiary of the Garden without prior written authorization. In addition, any report generated by your firm must adhere to the standards of confidentiality set forth above.

If you are unwilling or unable to treat such information as confidential or do not intend to respond to this RFP, please destroy the RFP immediately and notify the Garden that you do not intend to respond to the RFP. At the conclusion of the evaluation and selection process, your firm must continue its ethical and professional obligations to keep the RFP and any related information confidential.

The Garden commits to maintain in strict confidence any information you submit in response to this RFP and will destroy your response at the end of the RFP process if you are not selected.

VIII. INFORMATION REQUESTED FROM CONSULTING FIRMS

A. Executive Summary

Please provide a brief (maximum one page) overview of your firm's overall qualifications to advise the Garden with respect to the Garden's industry and the scope of work.

B. Primary Contact/Relationship Partner

The Garden expects firms to appoint a senior partner/member as the Garden's "Relationship Manager," who would be responsible for managing and coordinating the firm's operations across all matters relating to the Garden. Please propose a member of the firm to fill the role of the Garden's Relationship Manager, and the reason you are proposing this individual.

Please provide the firm's proposed methodology and timeline to managing the Garden's plan.

C. Consultant's Expertise in Services Area(s)

Please identify with specificity the pertinent expertise, capabilities, resources and experience that your firm offers with respect to each discipline described earlier, including experience in dealing with non-profit organizations such as the Garden.

D. Staffing

Please provide a list of individuals your firm anticipates will work on matters for the Garden.

Keep in mind that the Garden is seeking to use the best resources with the most experience. Professional profiles should be succinct. In addition, please provide an overall firm biography.

E. Conflicts

Please give details of any known or anticipated conflicts of interest that would preclude or limit your ability to work with the Garden. If your firm has prior experience working for the Garden, please provide information regarding the services performed.

F. Pricing Proposal

The Garden is a private, non-profit organization. Prospective advisors should, where applicable, propose cost-effective fee arrangements. Responses will be evaluated on how competitive the proposed fee arrangements are. The total budget is \$60,000.

G. Please list value-added services that your firm could agree to provide at no additional cost.

H. Approach to Matter Management/Services

Please indicate practices or techniques your firm will implement in its work for the Garden to drive efficiency for transactions. Describe the anticipated results from these efforts. Briefly described how you ensure the best quality of service to your clients.

I. Differentiating Factors

Please list no more than three specific reasons why your firm should be selected to serve the Garden.

J. References

Please provide a list of representative clients, and provide points of contact whom we may contact as references for your work. The Garden will not contact references without prior notice to you.

K. Diversity initiatives and statistics

Please provide statistics on the number and percentage of women and minority personnel within each category of your firm. Describe how you will incorporate diversity in staffing the Garden matters. Describe any initiatives, such as outreach programs, in which your firm participates to increase diversity at your firm. Describe efforts your firm is currently undertaking to improve its diversity, both within your office and your external networks.

L. Pro Bono practice and initiatives

Please provide a brief description of your firm's pro-bono work and community service.