ADDENDUM ONE TO ALL FIRMS:

Reference: Request for Proposal (RFP) #LP013008

Commodity: Fundraising Data Analysis and Consulting Services

Dated: January 30, 2008

Proposal Due: February 11, 2008

Please reference the following for clarifications and changes to the RFP #LP013008 issued on January 30, 2008 for Fundraising Data analysis and Consulting Services:

1. Revised Scope of Services to read: The University and its College and Graduate School of Arts & Sciences seeks a qualified firm to provide data analysis and consulting services to assist with the development of the School’s strategic fundraising initiatives. Firms will provide services that may include but are not limited to the following:
   • Generate information regarding top gift prospect identification and prioritization, and current donor behavior and prioritization;
   • Recommend a prioritized framework to target prospective and current donors, and how to best to allocate program resources based on that framework;
   • Advise and make recommendations regarding best practices related to the School’s development structure, operations and performance measures;
   • Provide follow-up consultation support for program review, and/or other pertinent analysis or reporting needs.

   All other info in the original Scope of Services does not apply to this RFP.

2. This project is not considered a continuation of the annual giving research completed in 2007.

3. The University has recently conducted wealth screening of its alumni and donor prospects.

4. The University has recently developed or purchased statistical donor models to score and prioritize its annual, special and major giving efforts.

5. The University has recently conducted or contracted an assessment (audit) of their annual giving programs and structure. Given revised Scope of Services, this is now not applicable.

6. Clarification of what is envisioned as a ‘prioritized framework’ to target prospective and current donors: Given the size of the alumni base and large number of currently rated prospects, we are looking to develop a structure that best allows us to maximize giving potential.

7. Clarification of what ‘program resources’ will be considered in this project. (In particular, are resources narrowly defined as the central annual fund office’s direct marketing budget, or more broadly to include staffing of annual giving programs, and supporting departments, and/or marketing and staffing resources from decentralized programs via a charge back model or some other means of cost allocation.): Specifically, Arts and Sciences Development staffing of major and annual giving programs and staffing resources. Given revised Scope of Services, the marketing component is now not applicable.

8. We do not anticipate any further amendments being issued to this RFP.
9. Does the University have an estimate of how many segments the alumni population will be divided into? Given revised Scope of Services, this is now not applicable.
10. Firms may supply a firm price, or may respond with unit pricing and include ranges for each unit.
11. Current status of this program (i.e., are the analyses currently underway and, if so, is the work being handled internally or by an outside firm, etc.?) All prospect analyses are being done in house by gift officers and research office.
12. Total records are in the database. (Of these, how many have good email addresses? good phone numbers? good mailing addresses?):
   - Total Number of Living A&S affiliates: 152,812
   - Number of A&S Alumni: 106,612
   - Number of A&S Alumni with Email: 44,954
   - Number of A&S Alumni with Phone: 81,316
   - Number of A&S Alumni with Address: 100,468
   - Number of Current and Non-current Parents: 38,416
   - Number of Current and Non-current Parents with Email: 8666
   - Number of Current and Non-current Parents with Phone: 29,044
   - Number of Current and Non-current Parents with Address: 37,954
   - Number of Faculty, Former Faculty, Staff: 554
   - Number of Faculty, Former Faculty, Staff with Email: 303
   - Number of Faculty, Former Faculty, Staff with Phone: 432
   - Number of Faculty, Former Faculty, Staff with Address: 547
   - Number of Friends: 7230
   - Number of Friends with Email: 614
   - Number of Friends with Phone: 4336
   - Number of Friends with Address: 6810

This total is all Arts & Sciences: faculty, alumni, parents and staff

13. We anticipate selecting two or more firms during the negotiation stage scheduled for February 22nd.
14. There is no incumbent firm.
15. There is not a specific budget threshold for the requested services.
16. The University has not conducted this study before. Therefore, the prior year’s budget for conducting this study does not apply.
17. In order to a statistically valid sample size, indicate the total number of survey instruments being deployed and the overall N= population. Given revised Scope of Services, this is now not applicable.
18. How many focus groups are being requested? Will vendor be required to recruit participants? Given revised Scope of Services, this is now not applicable.
19. Will incentives be offered to focus group participants? Given revised Scope of Services, this is now not applicable.
20. The University will provide participant lists to identify current donors.
21. What are the actual reporting deliverables for this project (i.e., MS-PowerPoint report, etc.)? As related to the analytics, the University is looking for prioritization of prospects, subset of priority prospects, etc. An actual report as well as in a format that allows the University to input the data back into our data base.
22. There is no previous year work, so the findings from this upcoming study cannot be compared back to the previous year.
23. This RFP seems very market research focused. Regarding your preferred type of vendor, are you looking for a firm specializing in Fundraising Consultation or a Market Research agency that has conducted fundraising based studies? Given revised Scope of Services, this is now not applicable.
24. Clarification regarding bases of selection (Section C): These are the areas of importance the committee will rate each firm’s proposal in order to develop a ranking of firms based on their responses to the RFP.

25. It is not required, but is helpful, that the fundraising consultant have experience in the academic field.

26. Are marketing themes being developed in-house or will the selected vendor work collaboratively with an external advertising agency? Given revised Scope of Services, this is now not applicable.

27. Clarification of Section B, Scope of Services, bullet #2 “to generate information regarding top gift prospect identification”: Based on information on prospects, profiling of existing donors and experience with other analysis, please identify the top potential prospects to assist with prioritization of prospect pool.

If you have any questions concerning this Addendum or the RFP, please contact me at (434) 924-4216. Thank you for your participation in this RFP process. I look forward to receiving your firm's proposal by the due date and time.

Sincerely,

Lori Ponton
Senior Buyer

Please sign below, acknowledging receipt of this Addendum and return this document with your response to the RFP.

__________________________________________________________________________

Signature                                      Name of Firm

__________________________________________________________________________

Please Print Name of Person Signing Above Date