

**TO Prospective Supplier**

**FROM Kip Smalligan, Sr. Strategic Sourcing Specialist, Procurement Services**

**Ph 616/331-3211 Fax 616/331-3287 smalligk@gvsu.edu**

**DATE June 28, 2022**

**RE Request for Proposal #222-50
Fundraising Campaign Feasibility Study**

Grand Valley State University is accepting proposals for consultant services to assist with a comprehensive fundraising campaign feasibility study.

If you wish to provide this service, **submit your proposal by e-mail to smalligk@gvsu.edu
no later than 5:00 p.m. EDT on July 22, 2022**. Write **RFP #222-50** in the subject line of your
e-mail. Your proposal must be received by that date and time. No telephone, fax, or verbal quotations will be accepted. GVSU is not responsible for late, lost, misdirected, damaged, incomplete, illegible, or postage-due mail.

Contact Kip Smalligan if you have any questions at 616/331-3211 or e-mail smalligk@gvsu.edu.

**RFP Instructions**

1. Timeline

RFP questions due: July 14, 2022 5:00 pm EDT

Answers back to suppliers: July 18, 2022

RFP submission due: July 22, 2022 5:00 pm EDT

Supplier presentations: Week of August 1st

Second round (if required): Week of August 8th

Supplier selected: August 12, 2022

Project begins: Week of August 21st

Report due: December 16, 2022

1. Proposals must be submitted by e-mail to smalligk@gvsu.edu no later than 5:00 p.m. EDT on July 22, 2022. Write RFP #222-50 in the subject line of your e-mail. Your proposal must be received by that date and time. No telephone, fax, or verbal quotations will be accepted.
GVSU is not responsible for late, lost, misdirected, damaged, incomplete, illegible, or postage-due mail.
2. Questions from suppliers must be submitted by July 15 at 5:00 pm to smalligk@gvsu.edu.
3. Should it become necessary to revise any part of the RFP, notice of the revision will be given in the form of an addendum to all prospective suppliers on record as having received the RFP. Notice will also be posted on the [Bid Opportunities web page](http://www.gvsu.edu/purchasing/bid-opportunities.htm) of the GVSU Procurement Services website [www.gvsu.edu/purchasing/bid-opportunities.htm ]. Each supplier should acknowledge receipt of addenda in their proposal on the proposal form, but the failure of a supplier to receive or acknowledge receipt of any addendum, shall not relieve the supplier of the responsibility for complying with the terms thereof.
4. Grand Valley State University reserves the right to accept or reject any or all proposals.
5. Proposals should be limited to 10 pages. Each proposal should be prepared simply and economically, providing a straightforward, concise description of the service, approach, and ability to meet the University’s needs as stated in this RFP.
6. Complete the Proposal Form on page 5 and 6.

6. Include all costs to GVSU in proposal. Provide a cost schedule for optional or variable costs.

1. Suppliers may be asked to make a presentation to the evaluation committee.
2. Acceptance of awarded proposal will be made by GVSU purchase order.
3. Grand Valley State University’s Michigan sales tax exempt certificate will be made available to awarded supplier.
4. Direct all questions regarding this RFP to Kip Smalligan at 616/331-3211 or smalligk@gvsu.edu.

**Background**

This request for proposal is for assistance with a comprehensive fundraising campaign feasibility study for Grand Valley State University.

GVSU is taking a leadership role in the transformation of higher education and the creation of groundbreaking community partnerships to build and diversify the talent pipeline for our region and our state. The university has always been a student-centric teaching university, with a long history of deep engagement with West Michigan. Those two aspects of the university continue to broaden and deepen as we redefine what higher education can be for the future. Grand Valley’s entrepreneurial roots and history of innovation position the university for an exciting future in which donors play a critical role.

This study is being done in preparation for a future comprehensive campaign which will be the third in the university’s history. Leadership level donors from all constituencies will be involved in feasibility interviews including community members, alumni, corporations, foundations, faculty and staff, and parents. The goals for the campaign will be largely dependent on the results of this study but will likely exceed previous comprehensive campaigns. Draft funding priorities and messaging will be available prior to implementation of the study.

It is our hope to find a partner to assist us with this evaluation phase in our process as we move forward on an aggressive timeline. We would like the work to begin on this project in late August 2022.

**Project Objectives**

1. Create a full evaluation of the proposed case for giving and priorities, based on donor interviews and surveys.

2. Establish realistic goals and optimal timeframes for each stage of the campaign.

3. Generate a full report of findings, along with an executive summary, to include the following:

 • Summary of methodology

 • Key takeaways (What was learned? What opportunities/challenges were discovered.)

 • Case messaging evaluation…what tested positively.

 • Recommended fundraising goal and what is included in the goal.

 • Recommended timeframe and structure for the campaign.

 • Evaluation and recommendations for campaign leadership

 • Recommended campaign budget

 • Prospect strategy summary – recommended future donor engagement strategy based upon insights gained from interview participants

4. Analyze past giving data and perform data modeling to inform future fundraising strategy

**RFP Proposal Requirements and Considerations**

1. Responses should be limited to no more than 10 pages.

2. RFP response should include a preliminary background statement on the firm, proposed methodology - including recommended roles for the university vs. the firm – timeline for the engagement, and professional fees. Proposed interim and final deliverables must be clearly identified.

2. Assume that all documents for interviews including interview request letter, questions, and follow up are provided by the firm hired.

3. Also assume the firm will conduct all interviews and surveys, including questions and survey instruments. GVSU can provide lists and contact information in consultation with firm’s experts. It is possible that university personnel will accompany consultants for select interviews.

4. GVSU will provide proposed priorities and case language as a basis for testing.
Our expectation will be that the firm will provide value add in this area as we refine the case prior to testing and provide recommendations post testing.

5. GVSU will supply appropriate data to complete donor modeling. Major donor, annual giving, alumni, and planned giving models are of interest. Grand Valley will work with the selected supplier to prioritize modeling needs. If appropriate, separate pricing for data services should be included in the RFP response.

6. State the specific team members who will work with Grand Valley and their expertise.

7. Preference will be given to firms with experience in successful higher education comprehensive fundraising campaigns at the feasibility stage.

8. Please provide three client references (names, contact information) for projects comparable to GVSU’s.

9. Evaluation Criteria

 • Assessment of overall experience and competency with projects similar to this one.

 • Assessment of the proposed methodology and background statement.

 • References

 • Costs

1. Jennifer Wardrop, Assistant Vice President for University Development, will be the primary contact with the firm hired to create efficiencies in the process and keep us on the agreed upon timeline.

**PROPOSAL FORM**

**Fundraising Campaign Feasibility Study • RFP #222-50**

The undersigned certifies that to the best of his/her knowledge:

 There is no officer or employee of Grand Valley State University who has, or whose relative has a substantial interest in any contract award subsequent to this proposal.

 The names of any and all public officers or employees of Grand Valley State University who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as part of this submittal.

Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The undersigned further certifies that their company \_\_\_\_ IS or \_\_\_\_IS NOT currently debarred, suspended or proposed for debarment by any federal entity. The undersigned agrees to notify the University of any change in this status, should one occur, until such time as an award has been made under this procurement action.

Supplier declares the following legal status in submitting this proposal:

 A partnership

 A corporation organized and existing under the laws of the State of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 An individual doing business as (DBA) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Optional) Supplier declares that company is at least 51% owned, controlled and actively managed by (check all that apply)

 African-American Native American Woman/Women

 Asian American Multi-Racial ADA Disabled Person(s)

 Hispanic American

Supplier acknowledges receipt of the following addenda:

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

BASE PROPOSAL\_\_\_\_\_\_\_\_ATTACH\_YOUR PROPOSAL\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_dollars

($\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

The undersigned proposes to furnish all labor, materials, equipment, tools and services required to complete the work in accordance with the proposed Contract Documents listed herein, including all addenda issued pe rtaining to same, for the sum or sums as stated, and agrees that these Documents will constitute the Contract if accepted by Grand Valley State University.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Address City/State/Zip Code

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Office Phone No. Mobile Phone No. Fax No.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Authorized Agent Signature Name & Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Witness Signature Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Tax Identification No. Date

VIII. ACCEPTANCE: This proposal is accepted by Grand Valley State University

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Authorized Agent Signature Name & Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Witness Signature Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Office Phone No. Cellular Phone No. E-mail

\_\_\_\_\_\_38 1684280\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 GVSU Tax Identification No. Date