



Request for Proposal

Fundraising Data Analysis and Consulting Services

January 30, 2008

Issued by
Procurement Services
Charlottesville, Virginia

A. GENERAL INFORMATION

Reference Number: Request for Proposal (RFP) #LP013008

Issue Date: January 30, 2008

Preproposal Questions: Any questions concerning this RFP must be sent via email to the buyer listed below no later than 3:00 p.m., Monday, February 4, 2008 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 p.m. Monday, February 11, 2008. Proposals must be sent via email using the contact information in the box below. The University of Virginia (the "University") reserves the right to reject proposals received after the stated due date and time.

Negotiations: Negotiation Questions, if needed, will be sent to Firms on Friday, February 22, 2008.

Expected Award Date: March 21, 2008

Term of Agreement: The term of a resulting Agreement or Purchase Order will be for two years, with the ability to renew on the same terms and conditions, for five additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

REFER ALL QUESTIONS TO THE ISSUING OFFICE:

UNIVERSITY OF VIRGINIA
Department of Procurement Services
1001 North Emmet St, Carruthers Hall
P.O. Box 400202
Charlottesville, VA 22904-4202
Attention: Lori Ponton, Senior Buyer
Phone: 434-934-4216
Fax: 434-924-7615
Email: LP3S@virginia.edu

NOTE: During the RFP process, all communication must be directed to the buyer listed above, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Bill Cooper, the University's Director of Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu. Any failure to adhere to this requirement may result in the rejection of the firm's proposal or cancellation of the RFP.

This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: <http://www.procurement.virginia.edu/main/publicpostings/RFP.html>. It is the firm's responsibility to

ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement Services web site: <http://www.procurement.virginia.edu/main/>

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

B. SCOPE OF SERVICES

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.

The object of this research is to explore the current understanding of alumni giving to the University to determine which messages are most salient in converting alumni non-donors into donors as well as encouraging current donors to increase their level of annual giving to the University. Currently, the University operates a decentralized program in which there is a central Annual Fund operation as well as individual annual fund programs within the various schools and units. A plan has been formulated that will consolidate this effort so that the annual funds of all of the University's undergraduate schools (Architecture, Arts & Sciences, Curry School of Education, Engineering, Nursing, and McIntire School of Commerce) will operate from the central Development and Public Affairs Office. In order to evaluate the potential for this program and to develop possible themes around which an annual campaign could be developed, the University wants to understand current giving behavior as well as identify potential messages that will resonate with various target segments.

Firms will provide services that may include but are not limited to the following:

- Develop and finalize a research plan to include the most appropriate sample and segmentation and an appropriate survey instrument, and a plan to conduct potential focus groups for qualitative testing of identified themes based on quantitative research results;
- Generate information regarding top gift prospect identification and prioritization, and current donor behavior and prioritization;
- Develop and test survey instruments;
- Recommend a prioritized framework to target prospective and current donors, and how to best to allocate program resources based on that framework;
- Manage the data collection process;
- Conduct the survey to achieve the necessary sample size;
- Receive the completed surveys and prepare an analysis and recommendations for message;
- Conduct focus groups to test messages developed through quantitative research;
- Advise and make recommendations regarding best practices related to the School’s development structure, operations and performance measures; and
- Provide follow-up consultation support for program review, and/or other pertinent analysis or reporting needs.

C. BASIS OF SELECTION

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the services as described in the Scope of Services section;
2. The firm's experience (especially in higher education) in providing Services similar to those described in this RFP, to include the firm's references from clients.
3. The firm's price proposal;
4. The firm's Small, Woman-owned and Minority-owned (SWAM) businesses status and/or the firm's plan for utilization of SWAM businesses. For more information about SWAM and the University's SWAM plan, please see the letter at Attachment 1 and refer to the following site: www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf

Note 1: A 10% minimum weight will be given to this criterion in evaluating proposals.

Note 2: Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Bill Cooper, the University's Director of Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu.

D. CONTENTS OF PROPOSAL

Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content, and should be organized in the order in which the requirements are presented in the RFP. Firms should provide the following information:

1. A brief history of the firm and its experience, qualifications and success in providing the type of service requested.
2. A detailed description and the full specifications of the services proposed. Each firm should indicate in their proposal the firm's ability to achieve / comply with each specification. In the event that the firm wishes to propose an alternate specification that, in any way, differs from the above specifications, the firm should detail their proposed change(s) and how the proposed change would compare to the listed specification. Proposals should be formatted in such a way to address each of the above specifications in a line-by-line process.
3. The estimated start date of the services from the time of the order (i.e., 10 wks after order)
4. Information on any warranty associated with the services you are proposing and any extended warranty (include the price) that might be available.
5. The firm's proposed price / fee for providing the services, to include shipping charges (the University's shipping terms are FOB Destination).
6. At least three references where similar services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and their telephone number.
7. The firm's Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
8. Complete and return the information requested in Attachment 2, Firm Information.

NOTE: Virginia Freedom of Information Act

Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by firms as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. Firms may not request that its prices / fees or entire proposal be treated as proprietary information

E. TERMS AND CONDITIONS

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia.
<https://www.procurement.virginia.edu/forms/USVendorRegForm.html>
- The Selected Firm registering and accepting eVA Terms and Conditions prior to award.
<http://www.eva.virginia.gov/>
- The University's Mandatory Contractual Provisions:
<http://www.procurement.virginia.edu/main/publicpostings/rfp/mandatoryprovisions.pdf>
- The University's Preferred Contractual Provisions:
<http://www.procurement.virginia.edu/main/publicpostings/rfp/preferredprovisions.pdf>

Note: Unless a firm expressly and specifically states its exception to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.

- The University's Procedure for Resolution of Contractual Claims
<http://www.procurement.virginia.edu/main/publicpostings/rfp/resolution.pdf>
- Confidentiality
The Selected Firm acknowledges that in the negotiation and performance of an Agreement, confidential and proprietary information may be made available. The Selected Firm agrees to use reasonable efforts to maintain the confidentiality of such material, but in no event lesser than was used with like material of the receiving party, and not to make any internal use of such material not required under a resulting Agreement. The Selected Firm will not disclose the information to any third party without prior written authorization from the University, and will not use the information received by it, except to those of its employees, agents and consultants whose duties justify the need for access to the information provided that such individuals are subject to obligations of secrecy and limited use commensurate in scope with a resulting Agreement. These obligations will apply to verbal information as well as specific portions of the information that are disclosed in writing or other tangible form and marked to indicate its confidential nature. These obligations will not apply to any of the following which:
 1. Was known to the Selected Firm prior to receipt under a resulting Agreement, as demonstrated by the Selected Firm's records; or

2. Was publicly known or available prior to receipt under a resulting Agreement, or later becomes publicly known or available through no fault of the Selected Firm; or
3. Is disclosed to the Selected Firm without restrictions on disclosure by a third party having the legal right to disclose the same; or
4. Is disclosed to a third party by the disclosing party without an obligation of confidentiality, unless such information must be retained by that party for that party to fulfill its legal or contractual obligations under a resulting Agreement; or
5. Is independently developed by an employee, consultant or agent of the Selected Firm without access to the information as received under a resulting Agreement; or
6. The Selected Firm is obligated to produce as required by law, lawfully issued subpoena, or court order, provided that the disclosing party has been given notice thereof and an opportunity to waive its rights or to seek a protective order or other appropriate remedy.

Upon written request of a disclosing party, the Selected Firm will return all information disclosed in written or tangible form, and the Selected Firm will destroy all of its copies, excerpts, or notes made by it which contain any portions of the information unless otherwise provided for by the parties.

- **Data Collection List**
The Selected Firm will not sell or give the lists of University personnel to third parties or otherwise use such personnel information except as needed to provide the Services listed in the RFP.

F. OTHER INFORMATION

Insurance

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In not event should the Selected Firm construe these minimum required limits to be their limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A- financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Comprehensive Commercial General Liability:

The Selected Firm and any Subcontractor will maintain a minimum combined single Limit of Liability for bodily injury and property damage of \$500,000 per occurrence, with coverage for premises and operations.

Automobile Insurance:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of \$500,000 per accident on all owned, hired, and non-owned vehicles operated by their employees.

Professional Insurance:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for errors and omissions of \$1,000,000 per claim.

Attachment 1

Executive Vice President and Chief Operating Officer's Request for Commitment



Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women-and minority-owned (SWAM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have been less effective in securing long-term business relationships with minority-and women-owned businesses. We are determined to improve our record.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,



Leonard W. Sandridge
Executive Vice President and Chief Operating Officer

LWS:dr

Madison Hall · Post Office Box 400228 · Charlottesville, Virginia 22904-4228

Attachment 2
Firm Information

Full Legal Name (*Company name as it appears with your Federal Taxpayer Number*):

Address:

Telephone Number:

FAX Number:

Web Address:

Email Address:

Taxpayer Identification Number (*Social Security Number or Employer Identification Number*)

DUNS Number:

SWAM Information:

Is your firm certified with the Commonwealth of Virginia's Department of Minority Business Enterprises (DMBE): ☐ Yes ☐ No

Minority-Owned Business: ☐ Yes ☐ No

Women-Owned Business: ☐ Yes ☐ No

Small-Owned Business: ☐ Yes ☐ No

Is your firm registered as a vendor in the Commonwealth of Virginia's e-procurement system (eVA)? ☐ Yes ☐ No

Point of Contact for this Proposal:

Name:

Address:

Office No.

Mobile No.

FAX No.

Email Address: