



Division of Finance and Business Operations

Procurement & Strategic Sourcing
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July 12, 2023

**Addendum #2 To
Request for Proposal
RFP Comprehensive Fundraising Training dated June 16, 2023**

This Addendum must be acknowledged on Schedule D.

As a result of the pre-proposal meeting held on June 29, 2023 for the RFP Comprehensive Fundraising Training, the following questions have been submitted. The questions, and the University responses are as follows:

1. Under Section H: Vendor Profile, Experience, References and Lost Accounts #1 Vendor Profile should include it states: Upon University request, VENDOR must agree to provide publicly distributed annual reports and/or independently audited financial statements including its statement of financial position, statement of operations, and statement of cash flows for at least the past three years. Vendor must further agree to permit the UNIVERSITY, upon request, to audit VENDOR's books, but only as it relates to the Wayne State University account, including invoicing, operational, and technology controls (when applicable). The University is limited to 1 request per calendar year of this agreement.

We do not have publicly distributed annual reports or independently audited financial statements so we have no publicly distributed annual report to provide upon request. Is there a way to address that request in a different way if needed? There would be no issue if there was a request from the University to audit our books.

Response: Please indicate as such with your proposal to the University.

2. You mentioned we should under no circumstances talk to anyone at the University. In my desire to always be in full disclosure, I did have a conversation with Carol Hill, Senior Director, Philanthropy Mike Litch School of Business earlier last week before the pre-proposal meeting. Carol shared the RFP with us, and I set up a meeting to find out if the vision of the University was in alignment with ours, which is to support organizations moving from a more transactional to relational fundraising model. Feel free to reach out to Carol and let me know if this is an issue in any way.

Response: Please refrain from any further conversations with University employees. As this took place in advance of the meeting and without any interaction with the customer for this project, it will not interfere.

3. What is the breakdown of the rest of the fundraising team of 165? Once the 14 Directors/Senior Directors, 21 Major/Senior MGOs, 9 Individual Gift Officers, and VP & Associate VPs are accounted for, who is left on the team to train/coach and what are their roles?

Response: The scope of work for this particular RFP is focused on the staff we outlined in the RFP (major & principal gifts; leadership annual/individual giving; planned giving; VP & AVPs). The balance of the division's approximately 165 FTE includes staff for annual giving; donor experience (donor relations); prospect development (research & management); business affairs; executive services; corporate & foundation relations; alumni relations; analytics & data services; gift administration; and gift processing.

4. Is the assumption that the two planned giving officers are in addition to, not included in, the 21 Major/Senior major gift officers listed in the RFP correct?

Response: This is correct.

5. Should our proposal map out our plans for the full three-year contract period, or would your team be open to reviewing a proposal with a specific scope of work for the first year and envisioned next steps and goals for the following years? We have found that an iterative and flexible approach to campaign and major gifts training is most effective, and we want to be sure we can adjust our scope as necessary to best fit the needs of your team as the training and campaign unfold.

Response: Yes, we are open to a more iterative and flexible approach for years 2 and 3 so long as we can see reasonable long-term goals, envisioned next steps and objectives in the proposal. We would like a specific scope of work and outcomes for the first year as part of the proposal.

6. Does your team have a budget or budget range in mind for this partnership?

Response: The University does not release budget information on pending projects.

7. May we have information regarding the diversity of the front-line fundraising staff that will be participating in training? (Gender, race, experience level, etc.?)

Response: This information will be released to the awarded vendor

8. An “onboarding library” was mentioned during the meeting. Is it possible to share a list of the topics covered in this library/the onboarding training process?

Response: Because our division does not have a FTE devoted to talent management at this time, the onboarding process is inconsistent across division managers, however we do have a library of resources available for the entire division to use. The topics include: what is an endowment and how does it work the journey of a gift at WSU; contact reports – significant contacts versus other contact types; how to navigate CRM Advance; the annual impact report process; how to secure a visit; the prospect qualification process; how to leverage alumni relations to engage prospects and donors. These are just some examples.

9. Regarding prospect research: what is the level of information a gift officer receives when a donor is placed in their portfolio? When is a full donor portfolio available to a gift officer and how do they have access to a prospect research team?

Response: Gift officers receive all information in the prospect record when a prospect is assigned to a portfolio. This information includes all relevant affiliations with the University; contact information; past officer assignments if applicable; lifetime giving history to the University; wealth indicators, including Blackbaud net worth estimates, Wealth Engine capacity ratings, and any additional details determined through our internal research qualifications; historical contact reports; information on past engagement touch-points with the University (event attendance, volunteer affiliations, etc.). Within three months of joining the team a fully assigned initial prospect portfolio is available to the gift officers. Each gift officer meets quarterly with the Prospect Development team to review individual officer portfolio analytics, update prospect stage codes and monitor portfolio penetration and coverage. Gift officers can also request research for assigned prospects at any time, although in most cases, we encourage the first steps with assigned prospects to be through gift officer outreach and prospect conversation. We use CRM Advance as our database of record (all gift officers have access and receive training on the CRM). We also use Blackbaud FPM for quick prospect record review, contact report and proposal entry, and a gift officer mobile application.

NOTE: As a result of the lateness of this addendum's release, the Bid Due Date has been extended. The new due date is July 17, 2023 at 4:00 pm.

Do not contact the Development and Alumni Affairs, or other University Units, directly as this may result in disqualification of your proposal.

Thank you

Kimberly Tomaszewski,
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CC: **David Ripple,** Attendees list.

Attachments: