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| wsu-primary-horz-color-600-10-2017-small**Division of Finance and Business Operations** |  | **Procurement & Strategic Sourcing****5700 Cass Avenue, suite 4200****Detroit, Michigan 48202****(313) 577-3734** **FAX (313) 577-3747** |

**November 15, 2022**

**Addendum #1 To**

**Request for Proposal**

**RFP Wealth Screening datedNovember 7, 2022**

**Minutes of the Pre-Proposal Conference**

**This Addendum must be acknowledged on Schedule D.**

The pre-proposal conference for the **Wealth Screening** was held on **November 15, 2022 at 9:00 am Valerie Kreher** reviewed the administrative requirements of the pre-proposal package, especially concerning details such as bid due dates and who vendors may contact during the live bid process. **Yasmin Habib** of the **Division of Development and Alumni Affairs, Office of Prospect Research and Management**, discussed the expectations and scope of work.

The pre-proposal conference attendees sign in sheet and meeting minutes are available for downloading from the University Purchasing Web Site at **http://go.wayne.edu/bids**.

**Numerous simple questions and answers were addressed at the pre-proposal meeting. Some of the issues were as follows:**

1. This RFP included an **Optional pre-proposal meeting.** In cases where the pre-proposal meeting is mandatory,only those vendors that attended the will be allowed to participate in this RFP Opportunity
2. The Deadline for project related questions is **November 17, 2022*,*** **12:00 noon**.
3. **Bids are due by electronic submission on** no later than 2:00 p.m., **November 22, 2022.** The link for bid submission will be posted with the bid details at **http://go.wayne.edu/bids** beginning **November 7, 2022**.
4. ***The contract(s) will be for a three-year period ending on* January 31, 2026*.*** *Thereafter, the UNIVERSITY may, at its option, extend the contract, on a year-to-year basis for up to two one-year periods, through* **January 31, 2028*.*** *VENDORS must state maximum price increases (if any) for years two and three on Cost Schedule C****.***
5. For this project, a Certificate of Liability Insurance is **Required**
6. Wayne State University seeks a wealth screening solution that will identify and segment our population in a meaningful way based on capacity, affinity and propensity to give.
7. The ideal solution will offer automated integration with the donor database of record, with clearly defined algorithms and/or scoring models.
8. A dynamic, two-way integration with Ellucian CRM is desired.
9. Currently requesting 6-8 seats on the software platform - give or take one or two seats.
10. The Wayne State University donor database contains 600,000+ records in total. A large number of that will be screened but not all. An estimated 500,000 records are individuals, with the remainder comprised of corporations, foundations and other organizations.
11. Vendors should incorporate a recommended number of screenings to achieve the objectives outlined in the scope of work, beginning with a minimum of 100,000 screens annually. Vendors may include tiered pricing models by record count if necessary.
12. Previous wealth screening vendor information will be provided by request to the selected vendor, including timelines and record counts. Ratings and proprietary scores provided by previous vendors will not be shared.
13. Relative to predictive modeling, the ideal solution will address all giving levels including annual, major, principal and planned giving. Major gift threshold is $25,000+ currently, however, current planning discussions anticipate increasing the major gift level to $100,000+ before the public launch of the campaign. Principal gift is currently defined as $1 million+ and is also being reviewed and may be increased to a level in the range of $2 million to $2.5 million.
14. Wayne State University had total fundraising production of $72 million in fiscal year 2022. The last comprehensive campaign concluded on 9-30-2018. Our target run rate is $100 million annually, and the tentative campaign goal is $1 billion.

Data points for integration to Ellucian CRM include net worth and capacity data but should prioritize custom scoring and/or predictive analytics. Custom fields are available and can be utilized.

1. Any responses, materials, correspondence, or documents provided to the University are subject to the State of Michigan Freedom of Information Act and may be released to third parties in compliance with that Act, regardless of notations in the VENDOR's Proposal to the contrary.
2. Parking on WSU campus lots and structures are $8.50/access. Vendor must build parking into their lump sum bid. There is no parking allowed on the malls.
3. Smoke and Tobacco Free Policies: On August 19, 2015, Wayne State joined hundreds of colleges and universities across the country that have adopted smoke- and tobacco-free policies for indoor and outdoor spaces. Contractors are responsible to ensure that all employees and all subcontractors’ employees are in compliance anytime they are on WSU’s main, medical, or extension center campuses. The complete policy can be found at http://wayne.edu/smoke-free/policy/
4. IMPORTANT - Minutes for the Pre-Proposal Meeting are distributed, and published on the website as an Addendum. Vendors are responsible for the information in this and all other Addenda, and must acknowledge each addendum in Schedule D.

All questions concerning this project must be emailed to: **Valerie Kreher**, Procurement & Strategic Sourcing at **313-577-3720** Email: **rfpteam2@wayne.edu** by 12:00 p.m., **November 17, 2022.**

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

Thank you

**Valerie Kreher**,

**Senior Buyer**, Purchasing

**313-577-3720**

CC: **Yasmin Habib**, Attendees list.

*Attachments:*