University of Massachusetts Amherst
RFP AA16-JM-5112
Post Campaign Assessment
Addendum 1
May 16, 2016

Below are the vendor questions that were submitted prior to the deadline listed in the RFP. University responses follow each of the vendor questions. All vendors responding to this RFP must incorporate these items into their response. Failure to do so may disqualify the vendor.

Q1. What is the overall goal or objective of this project?
A1. This RFP requests proposals to provide an objective analysis on the achievement of our goals and objectives as measured against our campaign operating plan, documenting key outcomes, highlighting areas of excellence and areas that did not succeed and key lessons we can take away from this campaign. UMass Amherst’s overall objective for this RFP is for the selected vendor to review the results received from the UMass Raising fund raising campaign and to recommend areas UMass can do better in any future campaigns.

Q2. Is there a proposed timeline for this project?
A2. To be completed by December 31, 2016.

Q3. When did the campaign begin and when did it end?

Q4. Was the campaign goal $300 million (as the website seems to suggest) and how much was ultimately raised?
A4. Yes $300 million and $359 million has been raised to date.

Q5. How many previous campaigns have been conducted by UMass Amherst and what were the respective goals and amounts raised?
A5. One campaign with a goal of $125 million and $130.7 million was raised.

Q6. Is the University contemplating another campaign? If so, when might this new effort begin?
A6. When we finish this campaign it is anticipated we will have another campaign in the next 2-3 years.

Q7. How many staff is in Advancement related functions? (e.g. development, alumni relations, development/alumni relations communications, etc.)? Is it possible to obtain an organizational chart(s)?
A7. There are a total of 107 staff members in Development & Alumni Relations. Org chart attached.
Q8. Has the University completed a wealth screening of its constituent database? If so, how many records were screened and when did the screening occur?
A8. Approximately 180,000 records were screened back in 2010.

Q9. Has the University engaged with fundraising counsel previously? How recently? If within the last three years, what is the reason for issuing this RFP?
A9. Yes, for a feasibility study in 2009

Q10. With respect to section 3.0 Bid Requirements/Deliverables, can you please elaborate on point b. and define synopsis and what with respect to the feasibility study would be provided to the consulting team?
A10. All forms of data from our alumni donor database.

Q11. What is your ideal timeframe? Are there any deadlines or events that will inform the engagement timeline?
A11. To be completed by December 31, 2016.

Q12. What resources, leadership time, and foundation board input can we expect to receive during the course of the engagement?
A12. Full resources with scheduled meetings.

Q13. Who is the primary stakeholder for this engagement? What involvement will that individual have in the project?
A13. Mike Leto, Vice Chancellor for Development & Alumni Relations. VC Leto will be heavily involved in the project.

Q14. What access will the consultant(s) have to fundraising records and the detail of campaign gifts recorded?
A14. Full access. Information to be compiled by our technical support group.

Q15. Are you able to identify the anticipated budget and desired date of report delivery for the assessment project?
A15. Budget to be determined. Project to be completed by December 31, 2016.

Q16. What level of access will the consultant(s) have to campaign leadership, campaign staff and volunteers?
A16. Full access with scheduled meetings.

Q17. Will proposals for this work be considered from consulting firms who participated in the delivery of initial feasibility study or who provided campaign services or counsel?
A17. Yes.

Q18. How will the results of the assessment be shared with staff, stakeholders and the university community?
A18. On an as-needed basis.

Q19. When did counting begin and when did the campaign go public?
Q20. Is there a campaign volunteer committee and was a volunteer network deployed during the campaign?

A20. Yes.

Q21. What are the campaign’s latest results --- overall and by campaign objective (students, faculty, programs, facilities, and annual fund)?

A21. $359 million has been raised to date with the five following campaign objectives:

- Students
- Faculty
- Buildings & Infrastructure
- Research
- Annual Fund

Q22. Aside from dollar goals, were there other campaign objectives – number of donors, planned giving goals, number of endowed faculty positions, etc. – that can be shared?

A22. Only the five objectives indicated above.

Q23. What’s the timeframe for this assessment – when do you intend to start, and what is the preferred completion date?

A23. Start and finish within the next 6 months.

Q24. How much did UMass Amherst raise during the last campaign?

A24. $130.7 million

Q25. How many gifts did you receive?

A25. To date, 265,000 gifts and pledges.

Q26. How much has UMass Amherst raised annually?

A26. We raise $40-60 million annually, including pledges and bequests.

Q27. Are you working with fundraising counsel? If so, are you anticipating a proposal from that firm?

A27. No.

Q28. Did you work with fundraising counsel during the campaign and feasibility study process? If so, are you anticipating a proposal from that firm?

A28. There was no fundraising counsel during the campaign. A feasibility study was done at the beginning of the campaign.

Q29. How important is it to you, on a scale of 1 to 10, that the consulting firm has staff members who live near UMass Amherst? (1 = least; 10 = most)

A29. 5

Q30. What is your view of a proposal that includes more than one firm? Is it a model you have used in the past? Do you see it as more of an advantage or a challenge to the success of the project?

A30. We would find that more challenging.

Q31. Do you have a budget in mind for this project? If so, are you willing to share it?

A31. To be determined.
Q32. What database did you use during the campaign?
A32. Ellucian Advance

Q33. Please describe the campaign report that will be available to us.
A33. Donors and dollars are displayed along with the subtotals for the five objectives mentioned above. Other data will be available upon request.

Q34. Are you seeking an analysis of the campaign results or an audit to verify the totals?
A34. An analysis of campaign results and lessons learned.

Q35. Has the institution identified strategic objectives for the next campaign?
A35. No.

END OF ADDENDUM 1