

## **ADDENDUM ONE**

March 24, 2016

To all Bidders on the Project Titled:

**Bid Number CL16-GN-0070**  
**Campaign Consulting Services**  
**University of Massachusetts – Lowell**

### **UNIVERSITY OF MASSACHUSETTS – Lowell**

Purchasing Department  
Wannalancit Business Center  
600 Suffolk Street, Suite 415  
Lowell, MA 01854

Reference Request for Proposal Documents dated March 17, 2016.

The attention of bidders submitting proposals for the above subject project is called to the following addendum to the specifications and drawings. The items set forth herein, whether of omission, addition, substitution, or clarifications are all to be included in and form part of the proposal submitted.

### **Questions and Responses:**

1. How is the \$125M goal distributed between the key objectives? Goals are \$35M each for Student Access, Faculty Leadership and Living & Learning, and \$10M each for Excellence in Athletics and Sustainability & Engagement. The Athletics goal may decrease to \$7.5M, with the remainder spread amongst the others.
2. How much has been raised in the leadership phase of the campaign? We'll announce on April 14 at app. \$78M, with the goal to complete the campaign by 2020.
3. What has been the involvement of volunteer leaders thus far in the campaign? Minimal, but that will change in the public phase.
4. Are there any metrics for the non-monetary campaign goals, public or private? Only to increase alumni participation to 13%. We're at 12% now, but we'll also be increasing enrollment each year for the next four years (about an additional 3000 total students), which means the denominator will grow each year.
5. What are the key campaign priorities? The areas listed in #1.
6. What is the current campaign volunteer leadership structure? In honor of our 125<sup>th</sup> anniversary and the \$125M campaign, we're creating an honorary committee of 125

top supporters. From that, we'll select co-chairs and a steering committee of app 15-25 key individuals.

7. How and to what extent are the campaign cabinet and volunteers currently involved in fundraising? They haven't been too involved to this point, other than as early donors.
8. How and to what extent are deans and senior leaders (outside of the advancement office) currently involved in fundraising? As involved as we need them to be. Some are very involved, including the Chancellor and President.
9. How many development staff at UML? How many are working on campaign? What proportion of their time is spent on campaign-related activities, as a department? 42 staff, and everyone is a part of the campaign. A campaign isn't a separate "thing"—it's what we do.
10. How much has been raised and what is the targeted amount raised to be announced at the public launch in April? Has the campaign reached set benchmarks thus far? \$78M raised thus far. We're well on track.
11. What is the top gift? What is the sum of the top five gifts? Top gift is app. \$10M, and our top 5 commitments total app. \$40M.
12. What is the breakdown of support between individuals, foundations, and corporations, to date? More than 50% corporate—it's the nature of our school. The remainder is split pretty evenly.
13. Have prospects been identified at the required levels to achieve goal? To some extent, but we need to develop the next level of six and seven figure donors.
14. How have the leadership transitions, both of the university and the development office, affected fundraising activities (positively and/or negatively)? From a university leadership position we haven't missed a beat, because the President of the system is our former Chancellor, and the current Chancellor has been on campus 30 years. I'd like to think the change in Advancement leadership hasn't slowed us down either, but has provided a bit of a spark for staff.
15. How much has been raised to date in the campaign? See #2
16. How large and for what purpose were the most significant Campaign gifts achieved to date? See #11. Most gifts have gone to endowment, although some have named colleges and buildings through those endowments.
17. Are your campaign initiatives tied to the University's Strategic Plan 2020? Yes.

18. How many staff members were added during the silent phase of the Campaign? *App 25% more—9 staff added.*
19. May we see an organization chart for the Advancement Office at UMass Lowell? *Attached.*
20. What fundraising increases have been achieved during the Campaign over the previous five years before Campaign? *Five years ago we were raising \$9M/year. Now we're raising \$20-24M.*
21. Are the best (fundraising) performing schools at UMass pre-campaign, continuing to perform at the highest levels in Campaign? *Fundraising was minimal pre-Campaign.*
22. Did you use counsel for the first/quiet phase? If so, will the selected firm have access to any reports, including feasibility studies and campaign plans, prepared by that firm? *Yes and yes.*
23. Is that firm under consideration for the public phase? *Yes.*
24. Do you have a budget in mind for this work? *No.*
25. Please clarify section 2.5, point b. Is anything else expected to be included in Attachment A: Proposal Offer? *No. Attachment A needs to be completed, signed and submitted by an authorized representative of the firm as part of their bid. Doing so, that person acknowledges and agrees to the statements set forth on the form; and attests that the proposal submitted is accurate and binding.*
26. How much has UMass Lowell raised toward the \$125 million campaign goal? *See #2*
27. How much does UMass Lowell raise annually? What percentage comes from each major donor constituency? *See #12 and 20.*
28. Approximately how many volunteers, senior university officials, and development officers will participate in campaign training? *That depends on what we decide is needed for training. I'm not convinced much training is needed at this point.*
29. Please tell us about your donor data management system. What system(s), how many records, any recent wealth screening or predictive analytics? *We use Advance. App 86,000 alumni records, and we do wealth screening.*
30. Has the University or the new VP worked with fundraising counsel recently? If so, will that firm be considered for this project? *Yes and yes.*

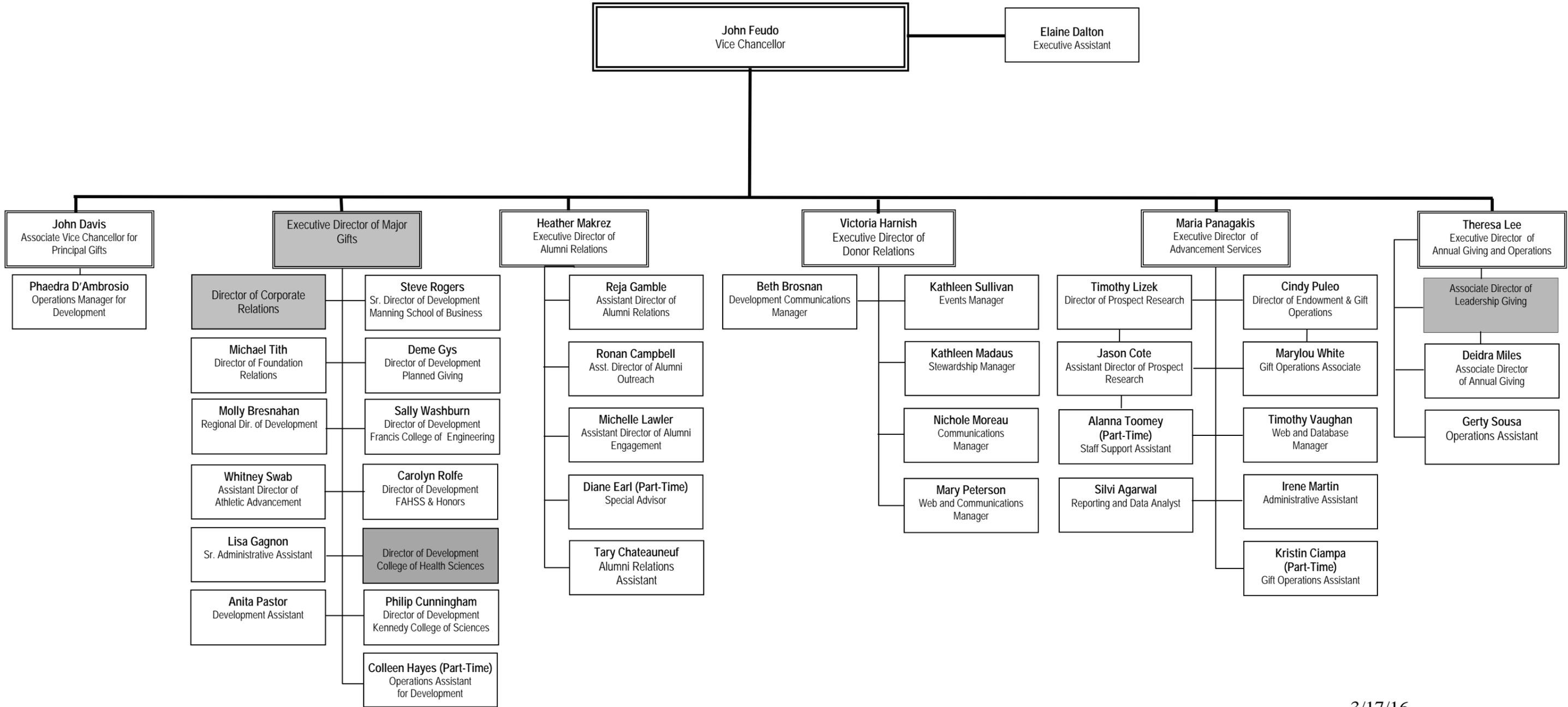
31. What is the term of the proposed contract (e.g., One year? The duration of the campaign?) *The duration of the campaign, likely through 2020.*
32. Has a feasibility study been conducted? If so, can you share the core recommendations? *Yes—the recommendations are what you see in #1.*
33. Has a Campaign Steering Committee been established? If yes, how many are currently serving? *See #6*
34. Several of the bid requirements reference performance management needs, in particular the “Campaign Progress and Prospect Development” section. These deliverables typically involve data screening services, analytics, establishing metrics, performance dashboards, etc. Do you foresee all of those deliverables being included in this project? Please describe what capacities currently exist at the university and what services you would expect the consulting firm to provide. *Yes, and most of these exist already. We need help in making sure we have the right metrics in place.*
35. 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? *My preference is one firm.*
36. How important is it to you, on a scale of 1 to 10, that the firm has staff that live near Lowell? *Not that important.*
37. What is your expectation for onsite time? Do you prefer a full-time staff presence or are you comfortable with a model that includes onsite and remote consulting? *No set expectation on onsite time—it depends on need. Remote consulting is fine.*
38. Have you envisioned a budget range for this project? If so, would you be willing to share it? *No*

**Attachments:**

University Advancement Organization Chart is hereby incorporated into the Campaign Consulting Services Request for Proposal as Attachment E.



# University Advancement



36 Full-Time  
 4 Part-Time  
 4 Open/Approved Positions  
 44 Total Staff

3/17/16

All other of the portions of the RFP Documents remain **unchanged.**

--End of Addendum No. 1--