

The University of New Mexico Foundation Office of Annual Giving Direct Marketing Request for Proposal (RFP) – 2011-2012 FAQ

Q: What is your participation rate?

A: Alumni participation rate is approximately 6% of the living alumni/ae of the University participated in the Development Program through contribution of funds."

Q: What is your retention rate?

A: Need to research.

Q: Are dollars or donors more important?

A: Dollars.

Q: Do you need to push a leadership society?

A: No.

Q: The RFP calls for renewal and non-donor acquisition in our proposal. What are the objectives and goals for each of those this year?

Please break it down by:

Goal for lybunts

Goal for sybunts

Acquisition

A: Our goal is to maximize revenue from alumni and donors, as defined by five year parameters stated in RFP. Open for suggestions.

Q: How do those goals compare to last year?

Follow up question: What assumptions were made, what data was used to determine the goals above?

A: Focused on donors within past five years and recent grads.

Q: What did you mail last year and what were the outcomes in \$ raised and participation?

A: We sent one mailing per unit (schools, colleges or programs). Approximately 18 mailings. Additionally we sent three broad based mailings: Year-End, Happy New Year and Wolf Mailings.

For the mailings:

Aggregate Participation Rate: 1.9%

Aggregate Dollar Range: \$1 - \$10,000

Through direct mail and phonathon program raised approximately: \$666,140

Q: Did UNMF do new donor acquisition last year? This year?

A: Last year we sent mailings to new grads for our Cherry & Silver Society. The Cherry & Silver Society is a giving society which recognizes alumni who give to UNM within 24 months of their graduation date and each year thereafter. In large part recipients of these mailings are nondonors. We continue to send such mailings this FY.

Q: The bid states a desire to focus on sybunts going back up to 5 years, please describe how the 5 year cut off came about.

A: Appeared to be appropriate cut-off for budgetary constraints. Open to other suggestions.

Q: Is the 8.5x14 package format absolutely what is desired or are other formats acceptable?

A: Other formats are acceptable. Open to suggestions while keeping costs low.

Q: Were all the direct mailing projects mailed using the same stationery for each or different stationery?

A: All unit mailings had the same look, with the exception of the College of Arts & Sciences mailing. The Year-End, Happy New Year and Wolf Mailings had their different stationery/package.

Q: If you did email last year what were the messages, was it sent as a precursor or follow up to direct mail appeals? What's UNMF's history with email fundraising? How many years has it been used, which segments and what are the results?

A: At this time the only regular emails sent are to Cherry & Silver Society members one month prior to their membership deadline. Email is not a formal part of our program at this time.

Q: Are annual giving solicitations designed to bring in unrestricted revenue, or restricted revenue, or both; or, is it appeal-based? Is there an overview of the restricted/unrestricted or goals of the program?

A: Both. In previous years we have unit specific mailings on behalf of the schools, colleges and programs. Restricted funds for the school/college were listed as well as Annual Fund and the option of Other.

Q: Are solicitations conducted on behalf of schools/colleges, or on behalf of the university overall?

A: In previous years we conducted on behalf of schools/colleges. This year our solicitations will be broad/university overall.

Q: Has UNM done any screening/rating, predictive modeling, or data-mining of the database? Is this information available to the successful vendor for further segmentation strategies? Is it desired that this data be used at all in annual giving programs?

A: We did have a screening done by Bentz Whaley Flessner in early 2009. Vendors may have access to the information. However, we do consider this information a bit outdated.

Q: Is UNM in a comprehensive campaign? What is the status of that campaign? Should the campaign and its progress/goals be the centerpiece of the annual giving program of solicitation?

A: Yes. We have an eight-year campaign, ending in 2014. Our dollar goal is \$675 million. To date we have raised approximately \$419.8M. The campaign may be a part of our solicitations.

Q: Can the institution personalize annual giving solicitations with fields such as name, salutation, address, gift amount, gift designation?

A: Yes.

Q: What is the particular audience for the May "Wolf Mailing?" Information provided refers to "donors" and "renewals" only; is it strictly Lybunts? Or is it a larger audience?

A: We included Current Alumni Donors, LYBNTS, LYBNTS+1, LYBNTS+2 and LYBNTS+3 (last gift made in Fiscal Year 2007)

Q: Currently, what is the average (or specific) donor renewal rate (e.g., the percentage, or number, of donors from FY10 who renewed and gave again in FY11), and what is the average (or specific) donor re-activation rate (e.g., the percentage, or number, of donors who have a giving history, did not give in FY10, but gave in FY11)?

A: Need to research.

Q: How many first-time donors made their first gift in FY10, and renewed that gift in FY11? And, how many first-time donors made their first gift in FY11?

A: Need to research.

Q: How many Long Lapsed alumni donors at this time (any gift prior to FY2007, but not since)?

A: Need to research.

Q: Who do they typically use for signers on appeals? Who will, and won't sign solicitations?

A: Last year, in large part, our mailings did not have a signer. We have used deans, department chairs and UNMF President or UNMF Foundation Chair. Open to discussion/suggestions.

Q: What is UNM's donor retention rate for the past five years?

A: Need to research.

Q: What are the Alumni participation percentages over the past five years?

A: Last year approximately 6% of the living alumni/ae of the University participated in the Development Program through contribution of funds." Do not have previous four years participation rate available at this time.

Q: Are you willing to share examples of your recent appeals, beyond the sample of the May "Wolf" appeal sample contained in your RFP? (PDFs would be great)

A: Yes.

Q: Are you able to provide any information and/or data regarding performance of the Cherry & Silver Society program for the same 5 year period?

A: Currently we have approximately 800 members in the Cherry & Silver Society. Need to research other stats.