

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

ABOUT THE UNIVERSITY OF NEW MEXICO FOUNDATION

The University of New Mexico (UNM) Foundation, located in Albuquerque, NM promotes excellence at UNM by raising, investing and managing private gifts through the cultivation of long-term partnerships with donors and matching their interests to the University's priorities. As an IRS 501 (c)(3) non-profit corporation, the Foundation provides donors the opportunity and appropriate tax advantages for supporting University projects and programs. All fundraising and investment activities of the Foundation are limited to benefiting the University of New Mexico. The Foundation assets and earnings are distributed to colleges, departments and programs of the University per donor directions.

For more background information visit the UNM Foundation website at unmfund.org.

ABOUT THE UNIVERSITY OF NEW MEXICO

Founded in 1889, The University of New Mexico now occupies 600 acres along old Route 66 in the heart of Albuquerque, a city of more than 700,000 people. Offering more than 210 degree and certificate programs, UNM has 94 bachelor's degrees, 74 master's degrees and 40 doctoral programs. Today UNM has 12 schools and colleges and as of Spring 2011 enrolled more than 27,000 students. The University is the state's flagship research institution. UNM research injects millions of dollars into New Mexico's economy, funds new advancements in healthcare, and augments teaching – giving students valuable hands-on training in state-of-the art laboratories.

For more background information visit the UNM website at unm.edu.

PURPOSE OF RFP

The UNM Foundation Office of Annual Giving seeks offers from qualified professionals to submit a proposal to conduct coordinated direct mail, email and other multi channel solicitation strategies (telemarketing is not planned for Annual Giving strategies this fiscal year) to solicit our UNM alumni/ae, friends and donor/nondonor audiences for Fiscal Year 11-12 (July 1, 2011- June 30, 2012). The purpose of these solicitations is to obtain funds for UNM, keep donors informed, and establish recognizable communication patterns and brand identity. The budget for this contract is \$75,000 - \$90,000. This budget shall cover **all** costs related to services such as design, printing, postage, distribution costs and professional services.

We seek to complete as many mailings and emails as the above mentioned budget will allow. A staple mailing to be included in the contract is our Wolf Mailing (sent to approximately 10,000 alumni donors).

The specs for Wolf Mailing are as follows:

- Letterhead: - 8.5 x 14 cut to 7 1/4 x 14 printed 2/2 on 70# White (PMS color 1935 & Black).
- Reply envelope: - 6 3/4 printed 1/0 on 24# White Wove (Black).
- Window face envelope: - 7 3/4 printed 2/0 on 24# White Wove (PMS colors 1935 & Black).
- Wolf graphics on carrier envelope and letterhead.

The Wolf Mailing would need to be sent the first week of May 2012. [For this mailing we are open to discuss different options/packages.] Sample of Wolf mailing attached.

For FY11-12 we plan to focus direct marketing efforts to past five year Donors/Friends, Lapsed Donors/Friends, and graduates within past five fiscal years that have not made a gift to UNM.

As of October 3, 2011, the UNM Foundation reports:

- Approximately 44,479 alumni and friends who have made a gift in the past five fiscal years (06-07, 07-08, 08-09, 09-10, 10-11.) Of these approximately 27,208 have a callable home phone numbers (with no restrictions) and approximately 17,611 have an email address (with no contact restrictions).
- Approximately 21,233 graduates within the past five fiscal years who have not made a gift to UNM. Of these approximately 13,684 have a callable home phone number (with no restrictions) and approximately 20,110 have an email address (with no contact restrictions).
- Approximately 137,834 addressable alumni and friends. Of these approximately 70,474 have a callable home phone number (with no restrictions) and approximately 78,192 have an email address (with no contact restrictions).
- Approximately 15,306 LYBNTS (gave in FY10-11, not yet in FY11-12. Of these approximately 9,925 have a callable home phone number (with no restrictions) and approximately 6,799 have an email address (with no contact restrictions).
- Approximately 7,727 alumni/donors who gave in FY09-10 but not in FY10-11. Of these approximately 4,864 have a callable home phone number (with no restrictions) and approximately 3,192 have an email address (with no contact restrictions).
- Approximately 20,850 Lapsed donors (no give in last 12 months, but in previous three years). Of these approximately 12,219 have a callable home phone number (with no restrictions) and approximately 7,649 have an email address (with no contact restrictions).
- Approximately 17,170 current donors (gift in past 12 months). Of these approximately 11,341 have a callable home phone number (with no restrictions) and approximately 8,108 have an email address (with no contact restrictions).

Our goal is to find a vendor/service provider that is a one-stop shop. Preferred qualifications include but are not limited to: copy writing, proofing, post office delivery, knowledge of postal regulations and best practices, creative concepts/graphic design, printing, production, ability to analyze data and help define strategic target segments, knowledge of fundraising for public universities, quality control, detail-oriented and checks and balances in place.

The Office of Annual Giving sends a newsletter once in the fall and once in the spring with approximate distribution of 20,000 per mailing. However, the newsletters will **not** be included in the contract.

Respondents are encouraged to propose contractual arrangements offering the maximum benefit to the UNM Foundation in terms of maximization of segmentation for optimal gift size and donor participation, fees, lead times and flexibility.

CRITERIA

1. Award Criteria

A Contract may be issued based on the proposal(s) considered the most advantageous to the UNM Foundation. Award will be made to the highest ranked, responsive and responsible vendor whose proposal the Office of Annual Giving deems most advantageous to the Foundation. Proposals will be evaluated using the factors stated below. The UNM Foundation reserves the right to make a split award or multiple awards. All proposals must comply with the requirements listed in this RFP.

2. Criteria for Selection

- A. Cost of Services – **Possible 35 points**
- B. Qualifications – **Possible 25 Points**
- C. Relevant Experience – **Possible 25 Points**
- D. Quality Assurance – **Possible 15 points**

Consideration may also be given to any additional information and comments if they should increase the benefits to the University.

PROPOSAL CONTENTS

- A. Cost of Services

1. Please define how many mailings, emails and other communication channels are feasible within FY11-12 within scope of anticipated budget of \$75,000 - \$90,000. Please include the Wolf Mailing or similar (first week of May 2012). Typically our mailings have been two color and include a #10 single or double window carrier envelope, 8 ½ x 14 white sheet with perforated remit device and a #9 Business Reply Envelope. We have also used live stamps for our mailings (usually nonprofit rate stamps).

B. Qualifications

1. General background, experience and qualification of Vendor.

C. Relevant Experience

1. Outline relative experience including any specific higher education, non-profit client work.

1. Please provide the following information for three higher education clients, preferably public universities.

- a. Name, address, email and telephone number of the client and a representative who may be contacted.
- b. Dates of relationship/contract.
- c. A brief written description of the services performed.

D. Quality Assurance

1. Please state and define any quality control systems implemented and maintained by Vendor.

Please be thorough and succinct. Proposals should be provided on single-spaced, single sided, 8 ½ x 11 inch paper in a font not smaller than 12 points. Number each page ____ of ____ total pages.

SUBMITTAL DEADLINE

The UNM Foundation Office of Annual Giving will accept proposals until 12:00 p.m. (Mountain Time) on Wednesday, November 9, 2011.

CONTACT INFORMATION

Attn: Margaret Ortega
Associate Director of Annual Giving
Two Woodward Center
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Albuquerque, NM 87102

Please mail proposal to address above or send via email to address below.

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Fax: 505-277-1280
Email: mortega@unmfund.org

TERMS OF CONTRACT

A contract is anticipated to be effective upon signing of a contract and continue through June 20, 2012.