

SALEM STATE UNIVERSITY

INVITATION TO BID
THIS IS NOT AN
ORDER

1. The university is an agency of the Commonwealth of Massachusetts and is exempt from any State tax or Federal excise tax
2. Unless otherwise stated, the unit price shall be the net price. Separate unit and total prices must be shown if applicable.
3. Unless otherwise stated, all quoted prices shall be FOB university address inside delivery.
4. Responses must be received on or before **Wednesday, November 21st, 2018 by 3:00 p.m.** in the Purchasing Department, Salem State University, Administration Building, 2ND Floor, 352 Lafayette Street, Salem, MA 01970-5353, at which time there will be a public opening. FAX to 978-542-6164 or scanned copies will be accepted at ewilson@salemstate.edu
5. Submit one (1) original if mailing, Electronic submissions preferred, Fax submissions accepted
6. Salem State University reserves the right to waive informalities and to reject any and all bids; or to accept the bid deemed best for the Commonwealth
7. For additional information:
**Cheryl Crouse, Associate Vice President and Campaign Manager, Institutional Advancement
Salem State University, 331 Lafayette Street, Salem, MA 01970
Phone: 978-542-7527 Email: ccrouse@salemstate.edu**
8. Responses must be submitted to:
**Evelyn Wilson, C.P.M., Director of Purchasing
Salem State University, 352 Lafayette Street, Administration Building, 2nd Floor, Salem MA 01970
Phone: 978-542-7321 Email: ewilson@salemstate.edu**
9. Reference: **RFP 2019-03 Campaign Feasibility and Organizational Readiness**

SPECIFICATIONS	UNIT PRICE	TOTAL PRICE
See Attached Specifications		

EQUAL OPPORTUNITY

The contractor agrees not to discriminate against any employee or applicant for employment because of race, sex, color, religious creed, national origin, and/or ancestry. The contractor agrees to post in conspicuous places notices to be provided by the Massachusetts Commission Against Discrimination with respect to the Fair Employment Practice laws of the Commonwealth which are herein made of this contract reference.

Vendor Information

 COMPANY

 ADDRESS

 CITY STATE ZIP

 TELEPHONE

 AUTHORIZED SIGNATURE

 NAME TITLE

 FEDERAL EMPLOYER'S ID CODE 9DIGITS

Salem State University Foundation

Request for Proposal: Campaign Feasibility and Organizational Readiness

To Whom It May Concern,

Salem State University is a leader in Massachusetts public higher education. Situated in the historic seacoast town of Salem, Massachusetts, it is Salem State's mission to provide a high quality, student-centered education that prepares a diverse community of learners to contribute responsibly and creatively to a global society, and serve as a resource to advance the region's cultural, social and economic development.

With over 64,000 alumni, local and regional corporate interest, and an active and loyal campus community, the university remains well positioned to support the goals of the universities strategic plan, under the leadership of a dynamic new president, John D. Keenan, JD.:

1. Financial Vitality

Strengthen Salem State's financial foundation, align resources with priorities and foster innovation to drive new revenue streams. Identify and implement additional opportunities to contain, reduce or avoid future growth in costs.

2. Collaboration, Inclusion and Stewardship

Foster a university-wide culture of inclusion, accountability, collaboration and stewardship.

3. Academic Excellence

Develop and support high-quality academic programs and innovative educational experiences that equip Salem State graduates to thrive in an evolving workforce and to navigate confidently in an increasingly complex and global society.

4. Student Success

Create a challenging and supportive learning environment that fully engages students in their learning and promotes attainment of academic, personal and career goals.

Having successfully completed a \$25M comprehensive campaign in 2016, and recognizing the importance of supporting these strategic goals as outlined, the Salem State University Foundation, Inc. seeks consultation as the university turns attention to and need toward conducting another comprehensive campaign.

Please review the enclosed ***Request for Proposal***. We look forward to your participation as we take the next steps in this critical time in the university's history.

Respectfully,



Cynthia McGurren



Cheryl Crouse

Request for Proposal: Campaign Feasibility and Organization Readiness

1. SCHEDULE

RFP release date	11/5/18
Pre-bid conference (optional) Call in Number: 866.723.4287 Participant Passcode: 8785657 Address: 331 Lafayette Street, Conference Rooms 205, 206, and 207, Salem, MA 01970	11/13/18 – 8:30AM
Proposal due date/due time	11/21/18 – 3PM
Notification of non-qualifiers	11/28/18
Top bidder interviews	12/17/18 – 12/19/18
Announce decision	1/7/19

2. INTRODUCTION

The Salem State University Foundation, Inc. seeks proposals for a single contract fundraising/campaign consultant (fee-for-service) to provide a comprehensive pre-campaign study, including campaign planning and institutional readiness studies. The conclusion of this engagement is to align with our goal of a January/February 2020 presentation to a joint meeting of the Board of Trustees and Foundation Board, resulting in a vote for or against proceeding with the campaign.

The scope of this engagement includes the completion of the following:

University Campaign Readiness Study:

- Conduct an internal assessment of fundraising operations and programs, with particular attention to staffing.
- Identify the types of fundraising strategies likely to be successful and necessary to reach our goal, including the level of resources necessary.
- Assess overall campus culture and environment and its level of readiness to support fundraising activities.
- Submit a final report that includes a summary of the internal assessment.

Campaign Planning Study:

- Determine the willingness of alumni, friends, donors, the university community and others to financially invest in the university and support proposed initiatives.
- Identify a potential campaign goal, including recommended campaign potential (size and scope).

- Submit a detailed final report that includes a summary of all findings.
- Lead the discussion with university leaders by presenting the final report in person to the university administration and volunteer leadership.

3. MINIMUM/MANDATORY REQUIREMENTS

- Bidder must have extensive and proven experience with fundraising campaigns and campaign feasibility with similar size higher education institutions.

4. EVALUATION CRITERIA

Factors that will be used to evaluate information include, but are not limited to:

- Business Experience & Proposed Methodology – bidder’s relative experience and track record in fundraising campaigns, as well as bidder’s proposed methodology.
- Functional Qualifications and Project Management Experience – Expertise of personnel identified in the response.
- References – The university reserves the right to check references other than those provided by the bidder and to ask follow-up questions to clarify any responses received.
- A transparent pricing proposal.

5. PROPOSAL REQUIREMENTS

Maximum of 30 pages including appendixes.

Implementation

- Describe your firm’s project approach and explain the proposed methodology for this project.
- Provide the project timeline.
- Describe the project team and identify the staff dedicated to this project including their title, role and qualifications.
- Outline the expected involvement of university team members.

Company Profile

- Provide information about the firm, firm history and growth, the number of staff and experience in philanthropy/fundraising consulting.
- Include the firm’s mission statement and/or corporate vision/values statement.
- Provide demonstrated experience of similar higher education projects with similar scope and size.
- Include information on any subsidiaries who will be providing the goods and/or services.

References

- Provide three references with contact information to verify bidder's direct experience in solution development with a university of a similar size, likeness and complexity. Include contact information and a description of the services provided.

Pricing

- Please provide an itemized budget for the requested service.

Legal Actions

- Disclose any claims or lawsuits that have occurred in the last 5 years against your firm. If there are none, please state.

Additional Information

- Information considered to be pertinent to this project which has not been specifically solicited in any of the above-mentioned sections may be placed in a separate appendix for possible consideration by the university.

6. SUBMISSION INFORMATION

- Proposals are due by November 21, 2018 at 3pm
- Proposals to be submitted via email (PDF) to Evelyn Wilson at ewilson@salemstate.edu
- Proposals should NOT exceed 30 pages, including appendixes

7. PRIMARY CONTACT INFORMATION

For additional information, please contact Associate Vice President, Cheryl Crouse at 978-542-7527 or ccrouse@salemstate.edu