

ADDENDUM TO REQUEST FOR PROPOSAL (RFP)

NEVADA SYSTEM OF HIGHER EDUCATION

Business Center North
Director of Purchasing
Reno, Nevada 89557-0064
(775) 784-6552

NOTE: ATTACH TO ORIGINAL RFP however if RFP has already been returned, complete this ADDENDUM and return for attachment to RFP prior to date and hour of opening as shown in the space provided therefor.

ADDENDUM NO. 1 RFP NO. 8293

DATE OF ADDENDUM: November 12, 2015

DATE ORIGINAL RFP RELEASED:

October 29, 2015

Opening Date: November 19, 2015 pm local time.

Creation of Development and Alumni Relations Planned Giving Website, Printing, Mailing and E-blast Services.

This addendum forms a part of the Contract Documents or modifies the original RFP Documents dated August 20, 2015, as noted below. Please acknowledge receipt of this Addendum as instructed above. Failure to acknowledge receipt of addendum may result in disqualification of bidder.

Question #1: Can companies from outside USA apply for this (from India or Canada)?

Answer #1: All proposals will be accepted.

Question #2: Do we need to come over for meetings?

Answer #2: Yes. It is expected that the vendor will regularly communicate with the Planned Giving Office regarding strategy and development. These meetings can occur remotely via telephone, email and other electronic media, but the vendor should expect to meet personally with staff from the Planned Giving Office on a periodic basis at the University of Nevada, Reno. In addition, the Vendor MUST be available via telephone, email and/or other electronic communication media for at least four (4) hours per day, Monday through Friday, during regular business hours: 8:00 am-5:00 pm (Pacific Standard Time USA).

Question #3: Can we perform the tasks (related to RFP) from outside USA?

Answer #3: Yes; however, all website applications and electronic templates must be compatible for use by users in the USA. All emails and printed materials must be delivered to addresses in the USA. The vendor must also be prepared to communicate, both in person and via telephone, email and other electronic means, with the Planned Giving Office staff. The Vendor should expect to attend periodic meetings with the Planned Giving Office staff in Reno, Nevada.

FIRM NAME:_____

DATE:_____

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(Type or print signer's name and title)

(Signature of person authorized)

Question #4: Can we submit our proposals via email?

Answer #4: Per bid instructions, all proposals must be mailed or hand-carried. Email proposals will not be accepted.

Question #5: Is it acceptable for a vendor to modify the General Terms & Conditions in your RFP and submit our changes with the proposal?

Answer #5: As stated in the RFP, proposer must explain all deviations and exceptions in writing and attach to their bid response. Changes will be reviewed by our legal department for acceptance.

Question #6: Item #6 on p. 14 – "It is requested that the scope of work be completed for approximately \$25,000 or less each fiscal year." Is this the budget for the entire scope of services for fiscal year 2016, including website design/development and print design and mailing? What are the dates for your fiscal year?

Answer #6: Yes. Fiscal years run from July 1 to June 30.

Question #7: Full-color newsletter(s) with a response card: Is this an 11x17" folded to 8.5" x 11", Multi-pages? Specific size of response card?

Answer #7: The Planned Giving Office will consider bids for two sizes of newsletters: (1) an 8.5" x 11" newsletter, which may be folded to 5.5"x11" for mailing. This newsletter should consist of 4 pages. The response card should be a size convenient for mailing, may be folded, and may be included as an insert in the newsletter. The response card should be suitable for mailing, or it can be designed to be mailed in a provided, addressed envelope; or (2) an 11" x 17" "self-mailer," which is folded and sealed for mailing. The folding may be in two or three sections. The response card for this newsletter may be attached by perforation for removal and mailing, or inserted inside the newsletter. The response card should be suitable for mailing, or it can be designed to be mailed in a provided, addressed envelope.

Question #8: Full-color postcard(s) with a response card: Is there a specific size in mind? 6x9" with perforated response card?

Answer #8: The postcard should be a size that is convenient for mailing, and may be folded for mailing. A 6" x 9" postcard would be acceptable. The response card should be a size convenient for mailing, and may also be folded. The response card may be attached to the postcard and perforated; or the response card may be included as an insert.

Question #9: Will the client be supplying the database for mailing addresses?

Answer #19: Yes.

Question #10: Do any current donor profiles currently exist? If so, how many?

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Answer #10: If this question refers to an electronic database containing donor information, a database of current donor profiles exists and is maintained by the University of Nevada Reno, Office of Development and Alumni Relations. The vendor will not be provided access to the database, but a file of pre-determined addresses will be provided for emailing/ mailing. If this questions refers to story profiles of specific donors for inclusion in the newsletter and postcards, stories from the University of Nevada, Reno will be drafted and provided by the Planned Giving Office based on the specific topic/theme of the newsletter or postcard.

Question #11: Will there be separate pages for each staff member? If so, how many?

Answer #11: There are 2 staff members in the Planned Giving Office. It is expected that contact information and a picture for staff will be included on one page.

Question #12: Please define “regular updates” as opposed to news.

Answer #12: “Regular Updates” refers to the periodic revision/ updating of the website, which includes the addition and/or revisions of new news stories, donor stories, articles, calculators, software operating the website, etc.

Question #13: Customized branding will include what exactly?

Answer #13: Customized branding will include University of Nevada, Reno logos, contact information, University photos, colors, etc., which will match the general branding included on the University of Nevada, Reno website: www.unr.edu, as determined by the Office of Marketing & Communications at the University of Nevada, Reno.

Question #14: Will videos be hosted directly on the website or through a YouTube or similar website?

Answer #14: Videos should be hosted directly on the website.

Question #15: Are you currently subscribed to an e-newsletter service (ex. mail chimp)?

Answer #15: No.

Question #16: What variables are used in the gift calculator?

Answer #16: The gift calculator should be able to present potential benefits, including tax benefits, for numerous planned giving vehicles, including but not limited to, charitable gift annuities (based on variables of amount of gift, age, and immediate or deferred payment); charitable remainder unitrust (based on variables of amount of trust, age, term, and payout); charitable remainder annuity trust (based on variables of amount of trust, age, term and payout); charitable lead unitrust (based on variables of amount of trust, age, term and payout); charitable lead annuity trust (based on variables of amount of trust, age, term and payout); and outright gift (based on variables of amount of gift and income tax rate).

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Question #17: Approximately how many “allied professional pages” will there be?

Answer #17: The number of allied professional pages will depend on the content provided therein. These pages should contain news regarding events/trends in the planned giving industry of interest to related professionals; legislative and regulative news and developments; copies of or links to governmental/agency pages with related statutes and regulations, current decisions, case law, etc.

Question #18: Who will write the content for the electronic and print communications?

Answer #18: The newsletters, postcards and emails may contain current events and donor stories from the University of Nevada, Reno, which will be drafted and provided by the Planned Giving Office. The newsletters, postcards and emails should also include news, current events, stories from the planned giving industry, and legislative updates and/or news releases from the IRS affecting planned giving that are provided directly from the vendor.

Question #19: Will interaction with the staff regarding strategy need to be done on site or can it be done remotely?

Answer #19: It is expected that the vendor will regularly communicate with the Planned Giving Office regarding strategy and development. These meetings can occur remotely via telephone, email and other electronic media, but the vendor should expect to meet personally with staff from the Planned Giving Office on a periodic basis at the University of Nevada, Reno.

END OF ADDENDUM NO. 1

All other terms and conditions remain the same.

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