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**1.0 PURPOSE**

As part of Missouri Western State University’s (MWSU) Development program, the Annual Giving Program is seeking Proposals from established client-outreach service provider to provide phonathon software and services off site. MWSU expects to contract with a firm, with an option to renew annually for up to two (2) additional terms (July 1 through June 30) after reviewing the increase in fees. Management fees will not exceed dollars pledged to the program.

**2.0 PROPOSAL INSTRUCTIONS**

* + Questions and/or requests for clarification should be submitted via email to the Purchasing Manager, Kelly Sloan (816-271-4465) at [purchase@missouriwestern.edu](mailto:purchase@missouriwestern.edu). All questions and/or clarifications can be sent at any time regarding this Request for Proposals until the end of business on Tuesday, August 4, 2015. Questions received after this date may not be answered.
  + All proposals are to be clearly marked with RFP16-021 on the sealed envelope.
  + All proposals need to be received at MWSU, Popplewell Hall, Room 221, 4525 Downs Drive, St. Joseph, MO 64507 by 2:00 pm CST August 6, 2015 to be considered. Any bids that arrive after this time or are not sealed will not be considered.
  + Return the following with your bid:
    - Completed Invitation to Bid document
    - This proposal specification sheet with your proposed amount
    - Initialed Addendums (if any) acknowledging receipt
    - Required documents outlined in section 6.0 (Two copies need to be sent)

**3.0 SELECTION TIMETABLE**

July 29, 2015 Request for proposal issued

August 6, 2015 Proposals due at 2:00 PM CST, in Purchasing Office

**NO EMAILED PROPOSALS ACCEPTED**

August 7, 2015 Committee selection / notification of firm

**4.0 SELECTION PROCESS**

Proposals will be evaluated based on the responses to specifics outlined below. Proposals that omit any of these items may be rejected as non-responsive.

The selected firm will be issued an official MWSU purchase order for each year of the award.

**5.0 SCOPE OF SERVICES**

The firm selected will be expected to perform all of the normal duties associated with providing phonathon services, including but not limited to:

1. Program Design and Implementation
   1. Campaign consultation, design and implementation
2. Marketing and Communication Services
   1. Phonathon scripts, letters and email communications
3. Information Services
   1. Data transfer and verification
   2. Data segmentation
   3. Reports
      1. Daily, fulfillment and periodic comprehensive reports
4. Matching Gift Verification
   1. Online identification and verification of matching gift companies
5. Standard Data Research
   1. NCOA Search, telephone append and wireless ID for approximately 25,000 prospect records
6. Trained Phonathon Callers
   1. Provide professionally trained off-campus callers

**Expected Outcomes of the Phonathon**

1. Secure pledges and donations to support the operational activities of MWSU
2. Increase the amount of constituent information regarding interests in and associations with MWSU to be used in segmenting donors for specific appeals
3. Increase donor participation of non-donors, and alumni, while regaining support from lapsed donors, SYBUNTS, & LYBUNTS

**Background Information**

Missouri Western State University, located on more than 700 acres in St. Joseph, Mo., serves Missouri and surrounding states. Originally founded as St. Joseph Junior College in 1915, Missouri Western was transformed into a four-year college in 1969 and became a full member of the State of Missouri system in 1977. In 2005, Missouri Western received university designation and changed its name to Missouri Western State University.

Today, Missouri Western offers certificates, associates, bachelors and master’s degrees. Student-centered, high-quality instruction emphasizes experience-based learning and community service.

**6.0 PROPOSAL FORMAT & CONTENTS**

The proposal must contain sufficient information to enable MWSU to effectively evaluate the proposal. It should be prepared in a clear and precise manner and should address all appropriate sections.

1. **TRANSMITTAL LETTER.** A one-page transmittal letter prepared on the proposer’s business stationery should accompany the proposal and required copies of the proposal.
2. **PROFESSIONAL TEAM AND PERSONNEL.** Provide a summary and qualifications of the professionals in your firm who are involved in phonathon services and who you expect will have involvement in these services for MWSU.
   1. Identify the individual who will manage these services on a day-to-day basis.

Define this individual’s position within the firm and indicate the degree to which he or she will be able to commit the firm’s resources.

* 1. Identify other professionals from your firm who will be assigned to work on this project, their roles and responsibilities, and relevant aspects of their background. How will these individuals work with the other members of your team?

1. **EXPERIENCE IN PROVIDING PROFESSIONAL PHONATHON SERVICES.**

Provide a list of recent transactions where your firm provided phonathon services, which includes the following:

1. Name of issuer;

2. Size and length of program;

3. Date of program;

4. Your firm’s engagement team; and

5. The structure of the phonathon (with regards to management and staffing of callers).

**D. Comments on Scope of Services.** Elaborate on the phonathon services you propose to perform. Include all options for managing and staffing, as well as a recommendation of a structure that will meet the needs of MWSU. When describing the structure of the recommendation, please include information on the required technological resources, options for sourcing these requirements, and the costs associated with each option.

**E. Record Retention.** Please explain the record retention policy surrounding the constituent information provided by MWSU. Include a summary of the types of constituent information typically required to perform such services.

**G. PRICE PROPOSAL – FEE DETERMINATION.** Selection of a phonathon software & service provider will not be based solely on price proposals. Once a selection is determined, MWSU may attempt to negotiate with the selected firm to establish a fair and reasonable fee. If an agreement cannot be reached with the selected firm, negotiations will be attempted with other firms in order of their selection.

**H. CLIENT REFERENCES.** Provide a minimum of three (3) client references for which you provide phonathon services. Furnish a name, agency, and telephone number for these references.

**7.0 SELECTION CRITERIA**

The submitted proposals will be reviewed according to the following:

1. Key individual experience
2. The university’s previous experience with the firm, if any
3. Staff and sub consultant experience
4. Similar project experience
5. Team experience in related skill areas
6. Management approach
7. Work examples
8. Fee proposal



**PRICING SHEET**

**RFP16-021**

The University reserves the right to reject any or all proposals and to waive any informalities.

Bid Amount July 2015 – June 2016: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bid Amount July 2016 – June 2017: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bid Amount July 2017 – June 2018: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized Vendor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_