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MISSOURI WESTERN STATE UNIVERSITY

REQUEST FOR PROPOSAL 19-004

FOR

PHONATHON SOFTWARE & SERVICE PROVIDERS

Submission Deadline: June 7, 2018 2:00 p.m. Central Time

Questions and/or requests for clarification of this RFP should be submitted via email to the Purchasing Manager, Kelly Sloan at [purchase@missouriwestern.edu](mailto:purchase@missouriwestern.edu). All questions and/or clarifications can be sent at any time regarding this RFP to the Purchasing Department until 2:00pm on May 24, 2018. Questions received after this date may not be answered. Please reference the RFP19-004 on all correspondence. Answers to the submitted questions will be emailed to each vendor as an addendum to this RFP. It is the responsibility of all interested parties to read this information and return it as part of the RFP confirming receipt.

**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, associate’s, bachelor’s and master’s degrees. Student-centered, high-quality instruction emphasizes experience-based learning and community service.

**1.0 PURPOSE AND TERM**

As part of Missouri Western State University’s (MWSU) Development program, the Annual Giving Program is seeking Proposals from established client-outreach service providers to provide phonathon software and services. 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 (ending June 30, 2021). The selected firm will be issued an official MWSU purchase order for each year of the award. Management fees will not exceed fulfilled pledges to the program.

**2.0 BIDDER INSTRUCTIONS**

* Proposals may not be accepted if the RFP number is not on the outside of the envelope.
* Proposal must be prepared in accordance with Submission Material (described below). Those proposals, which are not in compliance, may be deemed non-responsive.
* The last day for questions regarding this RFP is 2:00 p.m. Central Time, May 24, 2018. These should be submitted to [purchase@misssouriwestern.edu](mailto:purchase@misssouriwestern.edu).
* RFP should be submitted no later than June 7, 2018, 2:00 p.m. Central Time to:

**Missouri Western State University**

**Purchasing, Popplewell Hall 221**

**4525 Downs Drive**

**St. Joseph, MO 64507**

**3.0 TIMELINE**

May 17, 2018 RFP issued

May 24, 2018 Questions due via email to [purchase@missouriwestern.edu](mailto:purchase@missouriwestern.edu) by 2:00pm Central Time

June 7, 2018 RFP due at 2:00 PM

June 14, 2018 Committee selection / notification of firm

**4.0 SUBMISSION MATERIALS**

ELECTRONIC AND/OR FAXED COPIES WILL NOT BE ACCEPTED. Responses must be signed and sealed with the Respondent’s name and address clearly written on the outside. The Request for Proposals Bid Number (RFP19-004) shall also be clearly marked on the outside of the envelope or package. The following items should be mailed to MWSU by June 7, 2018 by 2:00pm.

* Invitation to Bid Page: Complete the required vendor contact information for RFP19-004.
* All required section found on page 4 under section 7.0 Proposal Format & Contents.
* Addendum: Include any addendums for verification of receipt.
* Current W-9
* Include one (1) original plus two (2) copies of all proposal submission materials for a total of three (3) hard copy documents.

**5.0 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.

**6.0 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. Providing access to calling software
2. Utilizing an effective calling strategy to ensure a positive experience for constituents
3. Developing effective scripts to enable callers to ask constituents for appropriate levels of support
4. Providing professional training of **off-campus** **callers furnished by the service provider**
5. Providing data management throughout the process, including daily reporting
6. Updating constituent contact information including cell append
7. Collecting constituent information regarding their interests in and associations with MWSU

**7.0 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.

**F. 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.

**G. 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.

**8.0 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

**9.0 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



**PRICING SHEET**

**RFP19-004**

Bid Amount July 2018 – June 2019: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bid Amount July 2019 – June 2020: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bid Amount July 2020 – June 2021: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

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

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

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

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