

Written Questions and Answers

Gift & Estate Planned Giving Marketing Program

RFP UK-2383-24

Closing Date: 11/21/23

Today's Date: 11/10/23

No.	Question	Answer
1	<p>What is working well and isn't working well with your current planned giving marketing strategy?</p>	<p>Positives: Good long term relationship with the current contractor; good understanding of who we are. Strong analytics dashboard and surveying capacity.</p> <p>Negatives: Individual pieces can be underwhelming aesthetically. Long production timelines.</p>
2	<p>Are you happy with the products and services that you are receiving from your current vendor?</p> <ul style="list-style-type: none"> • Why or why not, and what is it that you hope to see happen with a change in vendors? • What inspired you to issue this RFP? 	<p>Current contract is expiring 1/27/2024</p>
3	<p>What is your mailing quantity and ballpark budget?</p>	<p>25,000 print \$91,650 ballpark budget</p>
4	<p>What is the preferred format of the proposal or accepted formats (PDF, PowerPoint, Word document)?</p>	<p>See Section 3.6 Proposal Submission and Deadline</p>
5	<p>Being in the business for 60 years and successfully working with over 1200 nonprofit clients, we've been able to effectively submit proposals to RFPs electronically or if required, with mailed physical copies, but have not found USBs necessary with today's technology. In lieu of the USB format requested, is there an online portal or electronic option that would be accepted? If physical copies are necessary, would there be an option to mail the physical copies and submit the files electronically? We propose this to maximize the effectiveness and efficiency of both parties.</p>	<p>In order to be considered for an award you must follow Section 3.6 Proposal Submission and Deadline.</p> <p>At this time the University of Kentucky does not accept electronic responses.</p>

<p>6</p>	<p>Section 2.1 and Sections 4.6/4.8 outline of items to be proposed have variations in what's included. We've included a few clarifications below:</p> <ul style="list-style-type: none"> a) Do you have a specified list size/quantity you're requesting be quoted for the mailings (newsletters, postcards, etc. and if variation from one to the others)? b) Section 2.1 includes postcards, envelope enclosures, and current planned giving donor correspondence but 4.8 does not. <ul style="list-style-type: none"> i. Any specific insight on preferred format and quantity is valuable – please provide clarification. ii. With regard to current planned gift (PG) donor (vs. prospective PG donor) correspondence, is there a preference of having segmented versions of marketing pieces for current vs. prospective donors and/or a desire to have unique marketing or stewardship outreach to current planned gift donors? How many prospective vs. current planned gift donors are to be marketed to? iii. Section 2.1 references 'calendars': Is this referring to calendars/production schedules for the outreach we propose or UK branded calendars for UK donors/prospects? If the latter, any preference on size/format, quantity and well as use-case is valuable. iv. On the three (3) newsletters requested, do you have a preferred format or size of the newsletters (for example, 2, 4, 6 page, self mailing or enclosed in envelope, inclusion of cover letters or stand alone, windowed or match and mail, etc.) – While we can lead with our 	<ul style="list-style-type: none"> a) We're open to recommendations based on current best practices. That said, in the past, annually, we have sent 3 print newsletters to an audience of approx. 20,000 – 25,000, quarterly e-newsletters, and 2 targeted e-blasts. We have sent post cards from time-to-time, as budget allowed. b) <ul style="list-style-type: none"> i. Our print audience for all materials is generally 20,000 – 25,000 subject to budget. ii. Yes, we would like to see ideas and strategies concerning prospective and current donor segmentation. We have approx. 1,000 current PG donors. iii. Production schedules. i.v. We are open to ideas and strategies on current best practices. Currently, our print newsletters are 8 1/5 x 11 in., 4 pages, folded in the middle, enclosed in an envelope with an enclosed cover letter.
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	<p>recommendations, these factors also make a noticeable difference in quoted pricing.</p> <p>v. On the correspondence, is there a particular amount of the content intended to come from UK vs. the contractor?</p> <ol style="list-style-type: none"> 1. For example, is UK able to provide donor stories, impact stories, etc. or needing the contractor to interview donors and write the stories? 2. Will UK team be able to infuse UK's voice and provide UK specific content around impact of support, quotes, etc., leaning on the contractor for PG focused content, or will UK require the contractor to embed themselves in UK's voice, search existing marketing/website for content, provide custom writing, etc.? <p>vi. Brochures/Guides are mentioned, are there specific topics or formats most needed? For example, a general giving brochure, gift types specific and if so which gifts; for booklets are you requesting workbooks for donors to use or booklets outlining why/how to give with gift type options? Any specific quantity needed?</p>	<p>v. The contractor creates the cover letter content following input with UK. From time-to-time, UK will provide custom content and will make changes through the proofing process.</p> <ol style="list-style-type: none"> 1. UK is able and regularly will provide donor stories. 2. UK's team will infuse UK's voice and provide specific content. The contractor will be expected to learn the UK content and project the proper "voice" and content as the relationship develops. <p>vi. We are open to ideas and strategies regarding brochures and guides. Typically, an issue-specific brochure has been created to accompany each print newsletter to be used for follow up requests for more information.</p>
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7	<p>Section 4.6 references optional services including evaluation of planned giving prospects.</p> <ul style="list-style-type: none"> a. Please confirm the number of records in your database, the database/CRM from which records will be exported from/imported to, and the number of donor records. b. Are there specific items UK is hoping to uncover such as PG scoring, data appends like email addresses or wealth, etc. 	<ul style="list-style-type: none"> a. We have approx. 250,000 constituents in our donor database. b. We are interested in understanding your full capacity to provide data services.
8	<p>While note included in the RFP specifically, UK has historically noted valuing in having in depth program analysis/evaluation and strategy conversations throughout the year. Is this something UK finds value in including in the proposal, to ensure appropriate contractor resources are accounted for and included (ie: meetings with dedicated Education Strategist, analytics dashboard review calls, etc.)? If so, please note any desired cadence or specifics.</p>	<p>Yes, UK desires regular strategy and analysis from the contractor. UK desires a dashboard in line with current best practices to access key analytics such as website visitors, open rates, materials requests, survey capacity, etc. We desire to meet (zoom / conference call) every other week with the contractor to maintain production schedules.</p>
9	<p>Section 7.0 We provide all of our services based on the solutions offered and quantities contracted. We don't quote or bill time separately for editorial, graphic design, project management, etc., rather, all are embedded in the overall pricing. We are not structured to bill with varying hourly rates nor capable of quoting this way. While the RFP requests specific hourly rate line items, based on the way we've worked with other top research institutions, can we proceed with pricing summary for product/solutions (vs. hourly structure outlined in 7.0)?</p>	<p>Yes.</p>