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TO: ALL PROSPECTIVE VENDORS

RE: Addendum No. 1
Fundraising Campaign Consulting
Project No. SP24-08

Addendum No. 1 is issued to inform vendors that we have received questions that require a response and therefore, an addendum. Please refer to the questions and responses provided.

Please confirm that we have the correct email address for your company. This addendum and subsequent addendums will be sent to all firms who have expressed their interest in submitting a proposal.

Vendors are to acknowledge receipt of Addendum No. 1 in their response.

Please give Laura a call at 660.785.4326 or send an email at lthrasher@truman.edu if you have any further questions. We look forward to a response from your firm. Thank you.

Sincerely,

A handwritten signature in black ink that reads 'Laura K. Thrasher'.

Laura Thrasher
Purchasing Buyer

Question & Response

1. Is Truman State University Foundation able to share a summary of the proposed campaign priorities?
 - a. Campaign priorities will be centered on creating and sustaining high-quality educational experiences and programs for Truman State University students.
2. We understand that Truman's most recent campaign concluded in 2017 and raised \$43 million. Did this meet or exceed the university's campaign goal?
 - a. Yes
3. Can you provide details on the most recent campaign from 2017, including goal, timeline, and largest gifts?
 - a. The previous campaign began on July 1, 2013 and concluded on June 30, 2017. The fundraising goal was \$40M. The largest expectant gift was \$7M, and the largest single gift received during the campaign \$650,000.
4. Did Truman work with a fundraising consultant for its most recent campaign? Does Truman anticipate receiving a proposal from the previous consultant(s)?
 - a. Truman did not employ a fundraising consultant for the last campaign.
5. What qualities do you look for in a successful partnership with a consultant? What is most important to you in a partner for this process?
 - a. Truman is seeking a consultant to provide professional fundraising consulting services. The consultant will be expected to successfully meet the service requirements outlined in Part II of the request for proposal. Truman will evaluate all proposals based on Part III, Section D.
6. What does leadership envision Truman to look like in the next three to five years?
 - a. Truman State University will continue its mission to offer an exemplary, high-value education grounded in the liberal arts and sciences to well-prepared students who are job-ready, meet the state's labor needs, and offer new innovative programs.
7. Has Truman established a budget for this project? Is Truman open to sharing the amount/range?
 - a. Truman has not finalized a budget for this campaign initiative.
8. What administrative/logistical support can Truman provide during the study (e.g., scheduling interviews, arranging local accommodations)?
 - a. Truman will assist with scheduling campus-based interviews and contacting alumni and donors. Truman will not provide or schedule travel or lodging for the chosen consultant.
9. Do you anticipate receiving a proposal from any Missouri-based consulting firms?
 - a. Yes
10. What constituent relationship management (CRM) system does the Foundation use?
 - a. Technolutions Slate for Advancement
11. How many donor records are in your database? How many of these are active donors?
 - a. Truman has 165,278 living/active constituent records in its database; 52,421 living/active constituents have made a donation at some point; and 8,710 living/active constituents made a gift in the last five years.

12. What is the largest philanthropic gift or grant given to Truman?
 - a. The largest philanthropic gift received by Truman was \$3.4M.
13. Has Truman conducted a wealth screening exercise of the database recently?
 - a. Yes, Truman periodically conducts wealth screenings on specific segments of its overall database. The last mass screening was conducted 3/18/21 using iWave and the next screening is scheduled for December 2023.
14. Is there a board consensus on moving forward with this process?
 - a. The Board of Directors determines the institution's readiness to proceed with the campaign process. To some extent, the Board of Directors may rely on the phase I service requirements in making that determination.
15. Can you share more about the Foundation team? And the Advancement Office team? Is there an organizational chart to share? What is the average tenure? What is the support staff to frontline fundraiser ratio?
 - a. The Truman State University Foundation is governed by a volunteer Board of Directors primarily comprised of successful and engaged alumni. The Advancement team conduct Foundation operations, are they are lead by Dr. Ernie Hughes. The Advancement staff roster can be found at: <https://www.truman.edu/alumni-donors/contact-us-2/contact-us/>
16. How is President Thomas engaged with fundraising currently?
 - a. President Thomas is a member of the Truman State University Foundation Board of Directors, and she is regularly engaged in fundraising through direct donor contact and public presentations at the local, state, and national levels.
17. What does leadership envision Truman will look like in the next three to five years?
 - a. Truman State University will continue its mission to offer an exemplary, high-value education grounded in the liberal arts and sciences for well-prepared students.
18. Can you share any previous experience with strategic planning? When was the last strategic plan prepared, what was the process, what were the outcomes? How have the strategic plans been implemented previously? Can you share any plans to date? Are there any documents Truman can share with us that fully detail the strategic priorities?
 - a. Truman State regularly prepares and updates its strategic plan. The Truman State University strategic plan can be found at: <https://www.truman.edu/about/mission-vision/strategic-plan/>
19. How are key constituents and community members engaged with the organization currently?
 - a. Truman engages constituents through various events, programs, direct mail, stewardship, face-to-face meetings, and other engagement opportunities.

20. What is the Board of Governors' role in propelling fundraising efforts?

- a. The Board of Governors provides governance to the overall University, and they regularly connect Advancement to their networks. The Board of Governors often choose to financially support the University.

Foundation Board of Directors' role?

- a. The Foundation Board of Director members are highly engaged, and they are expected to donate. Board members regularly connect their network with the Advancement team, and they actively encourage alumni participation.

How experienced are Foundation Board members in raising funds?

- a. It varies among the members, but the majority of Board Members have experience soliciting funds from donors.

Are there established fundraising expectations for board members?

- a. Yes, 100% of Board members have given to the Foundation.

21. Can you describe the current Alumni Engagement program?

- a. Truman engages alumni with events, programs, direct mail, stewardship, face-to-face meetings, and other engagement opportunities.

What percentage of alumni give?

- a. 40% of alumni have given at some point; 9% have given in the past five years; and 3% gave in the previous year.

22. What was the impetus of this strategic growth plan following the record-breaking fundraising year?

- a. Fundraising is critical in order for Truman to achieve its mission. Truman continues to engage donors through various stewardship strategies via events, programs, direct mail, face-to-face meetings, and other types of engagement opportunities.

23. What motivated Truman's leadership to undertake this process?

- a. Truman's leadership is very supportive of the proposed campaign in order to support and enhance student opportunities.

24. Is there a new annual fundraising run rate that Truman State University Foundation (Truman) is trying to achieve?

- a. Yes, Truman intends to increase the number of donors and the size of gifts. Over the past 3 fiscal years, Truman has raised an average of \$3.1M annually with an average of 2,800 donors

25. Will Truman share the dollar amount and number of gifts associated with each fundraising method and sources of support (individual, corporate, foundation, etc.)?

Annual Average for the Last Five Fiscal Years (2019 - 2023)	
Amount (\$ in 000s)	# of Gifts
\$2,804	6,531
\$229	262
\$363	16
\$297	317
\$12	13
\$3,705	7,138

26. Do you have any high-level goals, early visions, or key themes that should be addressed in this process?

a. Student Success, which include scholarships, academic programs, endowments, athletic support, and mission enhancement.

27. The RFP states that the consulting contract will begin on January 1, 2024, and that the consultant “will be required to complete the feasibility study and external assessment...and submit a report...on or before February 1, 2024.” In our experience, a high-quality feasibility study and report requires more time than this. Is Truman open to adjusting the project timeline?

a. Please propose a Phase I completion date your organization will be able meet. At its discretion, Truman may consider an alternate Phase 1 completion date during its assessment of the proposals submitted.

28. What are the top 10-15 annual gifts? What is the source - individuals, foundations, corporations, grants?

All-Time, Unrestricted

Date	Amount	Constituent Type
2/12/86	\$127,000	Corporation
9/13/18	\$125,000	Organization Donor Advised
6/23/98	\$103,342	Alumna/us
5/4/23	\$100,000	Friend
1/1/80	\$100,000	Attendee, Athlete
8/7/97	\$77,000	Alumna/us
5/7/18	\$75,000	Corporation
2/13/85	\$75,000	Alumna/us
1/3/12	\$55,483	Non-Alum Spouse
6/17/09	\$49,505	Alumna/us
6/13/94	\$45,000	Trust
11/19/92	\$41,331	Alumna/us
8/3/95	\$40,000	Corporation
6/2/93	\$35,000	Trust
5/14/09	\$29,090	Alumna/us

Past 5 Years, Unrestricted

Date	Amount	Constituent Type
9/13/18	\$125,000	Organization Donor Advised
5/4/23	\$100,000	Friend
11/30/18	\$14,165	Friend
4/12/19	\$10,000	Organization Donor Advised
12/10/21	\$9,397	Friend
8/25/21	\$6,000	Friend
9/12/22	\$5,000	Alumna/us
3/31/22	\$5,000	Organization Donor Advised
9/18/19	\$5,000	Alumna/us, Athlete
6/17/21	\$5,000	Alumna/us
9/20/19	\$5,000	Alumna/us
6/21/23	\$5,000	Organization Donor Advised
6/6/22	\$5,000	Alumna/us
9/22/20	\$5,000	Alumna/us
4/26/21	\$5,000	Alumna/us, Athlete