



March 27, 2024

## ADDENDUM I

### PURCHASE OF A FEASIBILITY STUDY AND IMPLEMENTATION OF A COMPREHENSIVE FUNDRAISING CAMPAIGN

#### RFP-2024-0056

- I. Due to the closures listed at the bottom of this Addendum, the deadline to submit proposals has been extended to 2:00 p.m. C.S.T., Thursday April 4, 2024.
- II. In response to questions received:
  - A. **Question:** I tried to register as a vendor but in order to register I need an invoice number and amount. The RFP says to register before the submission deadline. Wondering if there is an alternate way to register.  
**Response:** On page 4 of the RFP document, the words, "Offeror may upload proposal to Alamo Colleges District e-Bidding portal", and the web-link associated with it, are hereby stricken. All proposals should be delivered to the address within the "Delivery Location" section on page 4 of the RFP document via US Mail or other carrier.
  - B. **Question:** Regarding the internships, while the monetary fee for service will be under \$1,000,000 threshold for this scope of work, the future project in question to be studied and strategized will exceed \$1,000,000. Are internship opportunities required or suggested in this situation?  
**Response:** As per Section 2 A.21 on page 16 and 17 of the RFP document, Student Internship Programs are required "When the scope of work on project is estimated to be greater than or equal to \$1,000,000 in value".
  - C. **Question:** Confirming that pages 25-35 would need to be completed only at the time the vendor is chosen as the successful partner and not earlier during the RFP process. Is that correct?  
**Response:** Correct. The Sample Agreement on pages 25-35 of the RFP document should not be completed during the RFP process.

- D. Question:** Has ACD previously undertaken a fundraising campaign? If so, did ACD meet or exceed the campaign goal?  
**Response:** Alamo Foundation has worked with a consultant but did not have a formal feasibility study, campaign structure, goal, or objectives.
- E. Question:** Has ACD worked with fundraising counsel in the past? If so, does ACD anticipate receiving a proposal from previous consultant(s)?  
**Response:** Yes. No, Alamo Foundation does not anticipate receiving a proposal from the previous consultant.
- F. Question:** 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?  
**Response:** Transparency, flexibility, follow up and collaboration are the qualities Alamo Foundation is looking for in a successful partnership with a consultant.
- G. Question:** Has ACD established a budget for this project? Is ACD open to sharing the amount/range?  
**Response:** ACD has a budget for this project, but would rather not disclose that information at this time.
- H. Question:** What administrative/logistical support can ACD provide during the study (e.g., scheduling interviews, arranging local accommodations)?  
**Response:** Alamo Foundation will provide assistance with scheduling meetings and interviews and provide meeting space during the feasibility study.
- I. Question:** Does ACD prefer fundraising consulting firms based in Texas or are you open to out-of-state firms submitting a proposal?  
**Response:** There is no preference to consulting firms based in Texas. Alamo Foundation is open to out-of-state firms submitting a proposal.
- J. Question:** What constituent relationship management (CRM) system does the ACD Foundation use?  
**Response:** Alamo Foundation uses Blackbaud's "Raisers Edge".
- K. Question:** Have you [Alamo Colleges District] conducted a philanthropic wealth screening recently?  
**Response:** Alamo Foundation has not conducted a philanthropic wealth screening recently.

**L. Question:** How much are they hoping to raise with the campaign?  
**Response:** The campaign target would be identified by the feasibility study; however, Alamo Foundation estimates at least \$25M-\$50M.

**M. Question:** The RFP is unclear about who the campaign will serve. Will the vendor be working primarily with the Foundation, with the District, or both?  
**Response:** The awarded Offeror will work primarily with the Foundation, however District and College leadership will be involved.

**N. Question:**

Purchase of a Feasibility Study and Implementation of a Comprehensive Fundraising Campaign RFP-2024-0056		
Item #	Description	Price
1.	Feasibility Study Development	\$
2.	Evaluation of Philanthropy Landscape	\$
3.	Needs Assessment for key programs and organizational readiness	\$
4.	Campaign Development with Strategies & Objectives	\$
5.	Other	\$

With regards to the price table, [page 20 of the RFP document] our standard approach is to include general campaign strategy in the presentation of our report and findings on #'s 1-3. However, what we would consider "Campaign Development" (cabinet development, final updates to case for support, prospect research, etc.) would typically be one aspect of our being retained for ongoing campaign management & counsel and is something we typically offer in a separate engagement/contract only if our client chooses to move forward. Is our understanding of "campaign development" congruent with your desires?

**Response:** Your understanding of "campaign development is in alignment with the Foundation's desires.

**O. Question:** Is it preferred that we specify campaign management services (monthly retainer) in the proposal as well under item 5?

**Response:** It is preferred that Offerors specify campaign management services (monthly retainer) in the proposal as well under item 5.

**P. Question:** What is the annual fundraising run rate for Alamo Colleges District (ACD)?

**Response:** \$7.6 million is the approximate annual fundraising for the Foundation.

**Q. Question:** What is the largest philanthropic gift or grant given to ACD?

**Response:** The largest philanthropic gift or grant given to the Foundation is \$20M (McKenzie Scott).

- R. Question:** How many donor records are in your database?  
**Response:** There are approximately 140,000 donor records in the Foundation’s database.
- S. Question:** How many of these are active donors?  
**Response:** There are approximately 2,500 active donors in the Foundation’s database.
- T. Question:** Has ACD conducted a wealth screening exercise of the database recently?  
**Response:** No, the Foundation has not conducted a wealth screening exercise of the database recently.
- U. Question:** Will ACD share the dollar amount and number of gifts associated with each fundraising method and sources of support (individual, corporate, foundation, etc.)?  
**Response:** The Foundation’s 2023 Fundraising Revenue is as follows:
- |                  |             |       |
|------------------|-------------|-------|
| Individuals      | \$1,897,207 | 21.3% |
| Foundation Board | \$ 45,137   | <1%   |
| Corporations     | \$4,215,217 | 47%   |
| Foundations      | \$2,741,826 | 31%   |
| Others           | \$ 4,425    | <1%   |
| Total            | \$8,903,812 |       |
- V. Question:** What is the Foundation Board’s involvement in fundraising?  
**Response:** The Foundation Board “leads by example” in the “giving and getting” of gifts. Members personally contribute \$1,000 or more annually and support fundraising success by identifying, cultivating, soliciting, and stewarding gifts.
- W. Question:** How is the Chancellor of Alamo Colleges District Dr. Mike Flores engaged with fundraising currently?  
**Response:** Chancellor Dr. Flores participates in cultivation, stewardship, and solicitation of high-level private donors, typically six figures and above, when the Foundation requests his support.
- X. Question:** How are the presidents of each college involved in fundraising?  
**Response:** All presidents are willing to conduct tours and meet with donors. Only St. Phillip’s College has dedicated Advancement staff.

**Y. Question:** Can you share more about the Alamo Colleges Foundation team?

**Response:** The Foundation team is led by an Executive Director who takes an active role in fundraising. The Development Team includes a Senior Development Officer, Annual Giving Director, Major Gifts Director, Stewardship and Engagement Manager and a Development Coordinator, all of whom are donor facing. The Foundation employs two senior level grant writers who focus on both public and private grants. The remaining Foundation staff work in Operations and Scholarship management.

**Z. Question:** We noted 15 FTEs listed on the foundation website. Are there any open positions?

**Response:** There are two new FTEs open on the Development Team – College Development Managers.

**AA. Question:** What is the average portfolio size for the Development FTEs?

**Response:** The average portfolio size for the Development FTEs is 50-100.

**BB. Question:** What is the average tenure for Foundation staff?

**Response:** The average tenure for Foundation staff 4 years.

**CC. Question:** Can you provide details on the most recent campaign, including case, goal, timeline, and largest gifts?

**Response:** The Foundation has never engaged in a formal capital or comprehensive campaign.

**DD. Question:** Can you describe the current Alumni Engagement program? What percentage of alumni give?

**Response:** Alamo Colleges District or Foundation does not have a formal centralized Alumni Engagement program.

**EE. Question:** What was the impetus of this feasibility study and future campaign?

**Response:** The impetus of this feasibility study and future campaign is the Chancellor's vision to identify long-term sustainable funding for key initiatives such as AlamoPROMISE.

**FF. Question:** What, ideally, would a future campaign support and fund?

**Response:** A future campaign would support and fund the Chancellor's vision to identify long-term sustainable funding for key initiatives such as AlamoPROMISE.

**GG. Question:** What does leadership envision ACD to look like in the next three to five years?

**Response:** Below are some of the changes Alamo Colleges' leadership envision:

- **Increased Fundraising Goals:** aim to significantly increase fundraising efforts over the next three to five years to support the foundation's mission and the needs of Alamo Colleges.
- **Expanded Scholarship Programs:** The foundation envision expanding its scholarship programs to support more students in pursuing higher education and career goals.
- **Enhanced Community Engagement:** seek to strengthen relationships with the local community, including alumni, donors, businesses, and other stakeholders, to garner support and build partnerships.
- **Strategic Partnerships and Collaborations:** aim to establish strategic partnerships and collaborations with other organizations, both within and outside the education sector, to maximize impact and resources.
- **Diversification of Revenue Streams:** work towards diversifying the foundation's revenue streams beyond traditional fundraising, such as through planned giving programs and investment strategies.

**HH. Question:** What motivated ACD leadership to undertake this process?

**Response:** The Chancellor's vision to identify long-term sustainable funding for key initiatives such as AlamoPROMISE motivated Alamo Colleges District leadership to undertake this process.

**II. Question:** Are there any documents ACD can share with us that fully detail the strategic priorities?

**Response:** Strategic priorities can be found at the following web site: <https://www.alamo.edu/about-us/strategic-planning/board-charges/>

**JJ. Question:** Is there a board consensus on moving forward with this process?

**Response:** This concept has not yet been presented formally to the Foundation Board, but will be presented at the next Board meeting.

**KK. Question:** Can you share any plans to date?

**Response:** Campaign planning is in the preliminary stages. The Foundation is seeking information to determine the potential scope and value of a campaign, as well as an assessment of internal readiness, appropriate timing etc.

**LL. Question:** How are key constituents and community members engaged with the organization currently?

**Response:** The Alamo Foundations' key constituents and community members are engaged with the organization currently through Board engagement, special events, employer relationships, strategic alliances, and partnerships.

III. Addendum II will be issued to respond to questions we do not have the answers to at this time.

IV. Please acknowledge receipt of this Addendum I with your proposal in Section 4, Offeror's Checklist in Item "Q" on page 21 of the RFP document.

**REMINDER: The deadline to submit a proposal for this project is 2:00 p.m. C.S.T., Thursday April 4, 2024.**

**PLEASE NOTE: The Alamo Colleges District will be closed for the following holidays:**

- Good Friday March 29, 2024
- Cesar Chavez Holiday April 1, 2024

During this time, we will not respond to any emails or phone call messages. We will respond to messages received when we resume operating hours the following business day after each of these closures.

All questions related to this RFP are to be directed to Terry Loomis, Assistant Director, Purchasing & Contract Administration, via email to: [tloomis2@alamo.edu](mailto:tloomis2@alamo.edu) with a copy to [dst-purchasing@alamo.edu](mailto:dst-purchasing@alamo.edu).