



REQUEST FOR PROPOSAL
RFP#803620

FY25-27 Annual Giving Mass Outreach

RFP Timeline	
RFP Issue Date:	April 19, 2024
Deadline for Respondent Questions to MSU:	April 25, 2024
RFP Response Due Date:	May 9, 2024, 3:00 pm Eastern
Estimated Contract Award	May 31, 2024

RFP Contact	
Name:	Brian Szpont
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Phone:	(517) 355-1700

DESCRIPTION: Michigan State University (the “**University**” or “**MSU**”) is soliciting proposals through this Request for Proposal (“**RFP**”) for the purpose of interested vendors to provide Annual Giving with printing and mailing services for the fiscal years of 2025, 2026 and 2027, running from July 1, 2024 through June 30, 2027. This RFP will lead to the selection of a highly qualified firm to assist with the direct mail solicitation needs of the Annual Giving department. The requested services are more thoroughly described under the Scope of Work Section of this RFP. Firms intending to respond to this RFP are referred to herein as a “**Respondent**” or “**Supplier.**”



PROPOSAL INSTRUCTIONS

- 1. PROPOSAL PREPARATION.** The University recommends reading all RFP materials prior to preparing a proposal, particularly these Proposal Instructions. Respondents must follow these Proposal Instructions and provide a complete response to the items indicated in the table below. References and links to websites or external sources may not be used in lieu of providing the information requested in the RFP within the proposal. Include the Respondent's company name in the header of all documents submitted with your proposal.

Document	Description	Response Instructions
Cover Page	Provides RFP title and number, important dates, and contact information for MSU	Informational
Proposal Instructions	Provides RFP instructions to Respondents	Informational
Respondent Information Sheet	Company and Contact Information, and Experience	Respondent must complete and submit by proposal deadline
Scope of Work	Describes the intended scope of work for the RFP	Respondent must complete and submit by proposal deadline
Pricing	Pricing for goods and services sought by the University through this RFP	Respondent must complete and submit by proposal deadline
Master Service Agreement	Provides legal terms for a contract awarded through this RFP	Deemed accepted by Respondent unless information required in Section 9, Master Service Agreement is submitted by proposal deadline

- 2. EXPECTED RFP TIMELINE.**

Activity	Date
Issue RFP	April 19, 2024
Deadline for Respondent Questions to MSU	April 25, 2024
RFP Response Due	May 9, 2024, 3:00 pm Eastern
Estimated Contract Award	May 31, 2024

- 3. CONTACT INFORMATION FOR THE UNIVERSITY.** The sole point of contact for the University concerning this RFP is listed on the Cover Page. Contacting any other University personnel, agent, consultant, or representative about this RFP may result in Respondent disqualification.
- 4. QUESTIONS.** Respondent questions about this RFP must be submitted electronically by email to the contact listed on the cover page of this RFP. In the interest of transparency, only written questions are accepted. Answers to all questions will be sent to Respondents via email. Submit questions by



referencing the following: (i) Question Number, (ii) Document Name, (iii) Page Number, and (iv) Respondent Question. Please refer to **Section 2** above for the deadline to submit questions.

5. **MODIFICATIONS.** The University may modify this RFP at any time. Modifications will be sent via email. This is the only method by which the RFP may be modified.
6. **DELIVERY OF PROPOSAL.** The Respondent must submit its proposal, all attachments, and any modifications or withdrawals electronically via email to the contact listed on the cover page of this RFP. **The price proposal should be saved separately from all other proposal documents and should be sent as a separate attachment from the other proposal documents.** The Respondent should submit all documents in a modifiable (native) format (examples include but are not limited to: Microsoft Word or Excel and Google Docs or Sheets). In addition to submitting documents in a modifiable format, the Respondent may also submit copies of documents in PDF. Respondent's failure to submit a proposal as required may result in disqualification. The proposal and attachments must be fully uploaded and submitted prior to the proposal deadline. **Do not wait until the last minute to submit a proposal.** The University **may not** allow a proposal to be submitted after the proposal deadline identified in the Cover Page, even if a portion of the proposal was already submitted.
7. **MANDATORY MINIMUM REQUIREMENTS.** The RFP may contain minimum qualifications, which will be identified as "**Mandatory Minimum Requirements**" in the Scope of Work Section of this RFP. If the RFP does contain mandatory minimum requirements, any proposal not meeting these minimum requirements **will be deemed non-qualified and will not be considered.** All proposals meeting these mandatory minimum requirements will proceed for review and evaluation consistent with **Section 8, Evaluation Process.**
8. **EVALUATION PROCESS.** The University will convene a team of individuals from various Departments within MSU to evaluate each proposal based on each Respondent's ability to provide the required services, taking into consideration the overall cost to the University. The University may require an oral presentation of the Respondent's proposal; conduct interviews, research, reference checks, and background checks; and request additional price concessions at any point during the evaluation process. The following criteria will be used to evaluate each proposal:

Criteria	Weight
Cost	75%
Timeline for mailing projects	10%
Providing samples	5%
Pre-print storage	5%
Secure Website	5%
	100%

9. **MASTER SERVICE AGREEMENT.** The University strongly encourages strict adherence to the terms and conditions set forth in the Master Service Agreement. The University reserves the right to deem a proposal non-responsive for failure to accept the Master Service Agreement. Nevertheless, the Respondent may submit proposed changes to the Master Service Agreement in track changes (i.e., visible edits) with an explanation of the Respondent's need for each proposed change. Failure to include track changes with an explanation of the Respondent's need for the proposed change constitutes the Respondent's acceptance of the Master Service Agreement. General statements, such as "the Respondent reserves the right to negotiate the terms and conditions," may be considered non-responsive.



- 10. CLARIFICATION REQUEST.** The University reserves the right to issue a Clarification Request to a Respondent to clarify its proposal if the University determines the proposal is not clear. Failure to respond to a Clarification Request timely may be cause for disqualification.
- 11. RESERVATIONS.** The University reserves the right to:
- a. Disqualify a Respondent for failure to follow these instructions.
 - b. Discontinue the RFP process at any time for any or no reason. The issuance of an RFP, your preparation and submission of a proposal, and the University's subsequent receipt and evaluation of your proposal does not commit the University to award a contract to you or anyone, even if all the requirements in the RFP are met.
 - c. Consider late proposals if: (i) no other proposals are received; (ii) no complete proposals are received; (iii) the University received complete proposals, but the proposals did not meet mandatory minimum requirements or technical criteria; or (iv) the award process fails to result in an award.
 - d. Consider an otherwise disqualified proposal, if no other proposals are received.
 - e. Disqualify a proposal based on: (i) information provided by the Respondent in response to this RFP; or (ii) if it is determined that a Respondent purposely or willfully submitted false or misleading information in response to the RFP.
 - f. Consider prior performance with the University in making its award decision.
 - g. Consider total-cost-of-ownership factors (e.g., transition and training costs) when evaluating proposal pricing and in the final award.
 - h. Refuse to award a contract to any Respondent that has outstanding debt with the University or has a legal dispute with the University.
 - i. Require all Respondents to participate in a Best and Final Offer round of the RFP.
 - j. Enter into negotiations with one or more Respondents on price, terms, technical requirements, or other deliverables.
 - k. Award multiple, optional-use contracts, or award by type of service or good.
 - l. Evaluate the proposal outside the scope identified in **Section 8, Evaluation Process**, if the University receives only one proposal.
 - m. Utilize third parties to assist in the evaluation process, provided such parties are subject to confidentiality requirements.
- 12. AWARD RECOMMENDATION.** The contract will be awarded to the responsive and responsible Respondent who offers the best value to the University, as determined by the University. Best value will be determined by the Respondent meeting any mandatory minimum requirements and offering the best combination of the factors in **Section 8, Evaluation Process**, and price, as demonstrated by the proposal. The University will email a **Notice of Award** to all Respondents. A Notice of Award does not constitute a contract, as the parties must reach final agreement on a signed contract before any services can be provided. The awarded Respondent is prohibited from partnering with losing bidders unless the RFP specifically allows for such arrangement, and any violation of this prohibition may result in disqualification of the awarded Respondent.
- 13. GENERAL CONDITIONS.** The University will not be liable for any costs, expenses, or damages incurred by a Respondent participating in this solicitation. The Respondent agrees that its proposal will be considered an offer to do business with the University in accordance with its proposal, including the Master Service Agreement, and that its proposal will be irrevocable and binding for a period of 180 calendar days from date of submission. If a contract is awarded to the Respondent, the University may, at its option, incorporate any part of the Respondent's proposal into the contract. This RFP is not an offer to enter into a contract. This RFP may not provide a complete statement of the University's needs, or contain all matters upon which agreement must be reached. Proposals submitted via email are the University's property.



14. **FREEDOM OF INFORMATION ACT.** Respondent acknowledges that any responses, materials, correspondence or documents provided to the University may be subject to the State of Michigan Freedom of Information Act ("FOIA"), Michigan Compiled Law 15.231 *et seq.*, and may be released to third parties in compliance with FOIA or any other law.



RESPONDENT INFORMATION SHEET

Please complete the following Information Sheet in the space provided:

Information Sought	Response
Contact Information	
Respondent's sole contact person during the RFP process. Include name, title, address, email, and phone number.	
Person authorized to receive and sign a resulting contract. Include name, title, address, email, and phone number.	
Respondent Background Information	
Legal business name and address. Include business entity designation, e.g., sole proprietor, Inc., LLC, or LLP.	
What state was the company formed in?	
Main phone number	
Website address	
DUNS# AND/OR CCR# (if applicable):	
Number of years in business and number of employees	
Legal business name and address of parent company, if any	
Has your company (or any affiliates) been a party to litigation against Michigan State University? If the answer is yes, then state the date of initial filing, case name and court number, and jurisdiction.	
Experience	
Describe relevant experiences from the last 5 years supporting your ability to successfully manage a contract of similar size and scope for the services described in this RFP.	
Experience 1	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
Experience 2	
Company name Contact name Contact role at time of project Contact phone	



Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
Experience 3	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	



SCOPE OF WORK

Please address each of the sections below in a written response, which can be completed on a separate sheet (using the same section headings).

1. Background.

The Annual Giving department of University Advancement is soliciting proposals from interested vendors to provide Annual Giving with printing and mailing services for the fiscal years of 2025, 2026 and 2027, running from July 1, 2024 through June 30, 2027. This RFP will lead to the selection of a highly qualified firm to assist with the direct mail solicitation needs of the Annual Giving department.

2. Scope of Work.

The RFP should cover all of Annual Giving's needs, including all printed materials, data and mail processing, and postage costs. Our direct mail program each year will cover a wide range of jobs from simple statement solicitation mailings to complex, personalized, multi-component mailings and the following stipulations must be met by the vendor:

- Vendor must be willing to pay postage up front so as not to delay the mailing of any project.
- MSU University Advancement must receive complete report of NCOA results and updates.
- Vendor must have the ability to provide multiple pdfs for proofing processes.
- Vendor must have thorough proofing process.
- 20 live samples are to be received of all mailings unless otherwise indicated.
- Data will be supplied to the vendor by Annual Giving. Vendor must have secure website for data file transfer that is firewall and password protected.
- Print projects will be provided to the vendor as In Design files and PDFs. Occasional changes or corrections may be requested by Annual Giving once copy has been delivered.
- Vendor must be able to store any pre-printed materials when necessary.
- Vendor must be able to mail a project within 8 working days of receiving our final data for a 100,000 pc, 3-way match.
- Vendor must be able to print a lockbox OCR code on all reply forms according to the Bank of America specifications. See attached. Vendor must work with the bank for testing to get coding approved which takes approximately six (6) weeks prior to June 30th.

Below are estimates of the main projects for each fiscal year for the bidding process:

1) Quarterly Mass Mailings - 1x a quarter beginning in July (400,000 pieces annually)

Outer envelope: #7 3/4 window, printed 3 color, 24#ww (print and convert due to bleeds) (different design each mailing)

Reply envelope: #7 reply, printed 1 color, 24#ww

Statement/reply form: 6.5 x 6.5 statement, 3/2, 70# opaque text with perf.

Mailing non-profit rate

2) College Campaign Mailing Specs – September (600,000 pieces)

8.5 x 11 letter, 2/0, no bleeds, 70# Opaque Uncoated text, up to 14 different version of letter

8.5 x 3.5 reply card, 2/2, no bleeds, 70# Opaque Uncoated text



Printing #10 closed face envelope, 2/0, no bleeds, 24# WW

Printing #9 reply envelope, 1/0, 24# WW

Mailing non-profit rate

3) Annual Giving Calendar Year End Mailing – December (120,000 pieces)

8.5 x 11 letter, 2/0, 70# Opaque Uncoated text

8.5 x 3.5 reply card, 2/2, 70# Opaque Uncoated text

#10 closed face envelope, 2/0, no bleeds, 24# WW

#9 reply envelope, 1/0, no bleeds, 24# WW

Mailing non-profit rate

4) High-end Giving Proposal Mailing – April (20,000 pieces)

Full color digital printing 21 x 11 personalized brochure, bleeds, 80# smooth cover score, on perf, then in 1/2, 1 art version, 1 text version

8.5 x 11 reply form, 4/4, no bleeds, 70# White text

Converting #9 1/2 booklet closed face envelope, 2/2, bleeds, 28# WW

#10 reply envelope, 1/0, no bleeds, 24# WW, 1 version

Mailing non-profit rate

5) Annual Giving Spring Mailing – April (150,000 pieces)

8.5 x 11 letter, 2/0, 70# Opaque Uncoated text

8.5 x 3.5 reply card, 2/2, 70# Opaque Uncoated text

Generic 8.5 x 3.5 buckslip, 4/4, bleeds, 100# White Silk text

#10 closed face envelope, 2/0, no bleeds, 24# WW

#9 reply envelope, 1/0, no bleeds, 24# WW

Mailing non-profit rate

6) Annual Giving Summer Mailing – June (150,000 pieces)

8.5 x 11 letter, 2/0, 70# Opaque Uncoated text

8.5 x 3.5 reply card, 2/2, 70# Opaque Uncoated text

#10 closed face envelope, 2/0, no bleeds, 24# WW

#9 reply envelope, 1/0, no bleeds, 24# WW

Mailing non-profit rate

7) Monthly New donor stewardship postcard and follow-up solicitation (20,000 total pieces per year, amount varies by month)

Postcard:

Full color digital printing 8.5 x 5.5 personalized postcard, bleeds, 100# White Silk cover Mailing non-profit rate

Solicitation (mailed two weeks after postcard)

Full color 6.25 x 9 personalized card/reply, bleeds, 10pt White cover

Full color 8.5 x 5.5 generic magnet host, bleeds, 120# White Dull cover

Generic 6 x 4 die cut picture frame magnet, 4/0, White .30 mil magnet stock

Converting #6 1/2 booklet (6 x 9) showcase window envelope, 3/0, no bleeds, 28# WW Mailing non-profit rate



8) Quarterly donor stewardship mailing (60,000 total pieces per year, amount varies by quarter)

Full color 6.25 x 9 personalized card/reply, bleeds, 10pt White cover

Full color 8.5 x 5.5 generic magnet host, bleeds, 120# White Dull cover

Generic 6 x 4 die cut picture frame magnet, 4/0, White .30 mil magnet stock

Converting #6 1/2 booklet (6 x 9) showcase window envelope, 3/0, no bleeds, 28# WW Mailing non-profit rate

Laser Printing. Data and Mailing Services for each projects:

Laser printing variable information onto letter, outer envelope and reply form as needed.

Insert personalized letter, personalized reply form and reply envelope into the matching carrier envelope.

3-way camera match

Mails nonprofit with live stamp

NCOA, Cass Certify and postal sort data

Key Dates:

Mass appeal is mailed quarterly, beginning in July.

Please provide quotes for postage for each project, with the understanding that postage rates could change.

****Please note, a secure website is a must.**



PRICING

Please include a Pricing proposal as identified below on a separate sheet.

Please provide pricing for each of the three years to be included in this agreement as a separate line on the quote.



MASTER SERVICE AGREEMENT

(attached)

Please refer to Section 9 of the RFP Instructions when reviewing the Master Services Agreement terms and conditions.

Please see the word doc version of the MSU Professional Services Master Service Agreement that was a separate attachment to the RFP.