



Procurement Services
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ADDENDUM NO: 1

IFB/RFP No: RFP-NKU -24-2021

Project /Commodity: Planned Giving Services

Date: 01/27/2021

Due Date: February 2, 2020 @ 2PM

BIDDER/RESPONDER SHALL CONFORM TO THE FOLLOWING CHANGES AS SAME SHALL BECOME BINDING UPON THE CONTRACT TO BE ISSUED IN RESPONSE TO THIS INVITATION FOR BID.

Planned Giving Services

SEE QUESTIONS BELOW – ANSWERS ARE IN RED TEXT

1. How many gift officers within University Development and the NKU Foundation will be utilizing the services of the planned giving consultant(s)? **Approximately 12**
2. Approximately how many donors will the planned giving consultant work with annually? **That number will be determined in consultation with the identified consultant. Initial thought and expectation is that consultant will work with 12-36 annually.**
3. What is the frequency of the educational and planning seminars for donors, prospects, and staff? Quarterly? **Monthly**
4. Will marketing content be used in existing, general marketing channels? If so, what is the frequency of planned giving content that is needed? **Yes, bimonthly**
5. Does a planned giving-specific marketing program currently exist? Yes. If so, who is the content provider? **Crescendo.**
6. At this time, is it anticipated that these services will be provided virtually, or in- person? **Both.** If/when in person, what is the geographic distribution of donors and prospects? **Most donors are located in greater Cincinnati and Kentucky, but some may be in Florida.**
7. Has the University worked with consultants to provide these services in the past? **No.**
8. Has the University established a budget for this work? **Yes.**

Holly C. Vasquez

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END OF ADDENDUM