



## CONTRACT RENEWAL LETTER

**Date:** May 23, 2025  
**Contract #:** UCPJMU6799  
**Service:** Fundraising Consulting Services  
**Renewal Period:** 7/1/2025 to 6/30/2026  
**Renewal #:** 1 of 10 One-Yr  
**Issued By:** James Madison University  
Shanna Devers, Lead Commodity Contract Officer Ph: 540-568-3131  
Fx: 540-568-7935  
**Contractor:** Bentz, Whaley, Flessner and Associates, Inc.  
Attn: Joshua Birkholz  
7900 Xerxes Avenue South, Suite 980  
Minneapolis, MN 55431 Ph: 952-921-0111  
**Contract Administrator:** Sheila Smith, Advancement

### **Description of Renewal Notice:**

In accordance with the renewal provision of the original contract all terms, conditions, and specifications of the original contract remain the same during the contract renewal period, along with any modifications that have been incorporated up until this point. The contract pricing for the contractor's travel allowance shall increase from \$1,000 per trip, per consultant to \$1,300 per trip, per consultant and all other contract pricing shall remain the same. An updated pricing schedule is attached to this renewal.

All invoices shall be submitted within sixty days of contract renewal term expiration as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.

Return one executed renewal notice to my attention within ten days.

### **Bentz, Whaley, Flessner and Associates, Inc.**

**By:** Katrina A. Klaproth  
JKatrina A. Klaproth

*Name (print)*

**COO and Owner** 5/23/2025  
*Title Date Signed*

### **James Madison University**

**By:** Shanna Devers  
Shanna Devers, CUPO

*Name (print)*

**Lead Commodity Contract Officer** 5/23/2025  
*Title Date Signed*

**Contract #:** UCPJMU6799

**Contractor:** Bentz, Whaley, Flessner and Associates, Inc.

**Renewal Period:** 7/1/2025 to 6/30/2026

**Commodity:** Fundraising Consulting Services

**Pricing Schedule**

1. Contractor's Pricing:

a. Area A / Campaign Readiness/Internal Audit and Feasibility Study:

Tasks	Total Cost	Cost Occurrence
Engagement Preparation	\$5,678	One-time
Internal Leadership Interviews	\$6,780	One-time
Giving Insight Analysis and Projections	\$33,900	One-time
Benchmarking	\$14,351	One-time
Program Optimization Reviews	\$96,615	One-time
Assessment Analysis and Report	\$38,646	One-time
Fundraising Agenda	\$16,724	One-time
Case for Support (writing)	\$13,560	One-time
Prospective Donor Interviews (40)	\$24,295	One-time
Prospective Donor Interviews (50)	\$30,510	One-time
Engage Dx Constituent Survey	\$22,600	One-time
External Planning Considerations	\$8,136	One-time
Analysis and Report Development	\$12,430	One-time
Report Review and	\$14,916	One-time

Presentation		
<b>*Area A Total (with 40 interviews)</b>	<b>\$308,631</b>	One-time
<b>*Area A Total (with 50 interviews)</b>	<b>\$314,846</b>	One-time

b. Area B / Campaign Preparation and Support per Year Cost (Leadership/Silent Phase):

Tasks	Total Cost	Cost Occurrence
Comprehensive Campaign Plan	\$20,905	One-time
Communications Plan	\$32,318	One-time
Volunteer Structure and Committees	\$37,290	On-going per year
Prospect Development Strategies	\$16,950	On-going per year
Donor Relations and Stewardship	\$42,940	On-going per year
Campaign Counting Policies	\$30,510	On-going per year
Training and Coaching	\$24,860	On-going per year
Ongoing Support and Counsel	\$36,160	On-going per year

c. Area C / Public Phase:

Tasks	Total Cost	Cost Occurrence
Ongoing General Counsel	\$54,240	On-going per year
Ongoing Annual Fund Counsel	\$33,900	On-going per year
Ongoing Communications Counsel	\$44,748	On-going per year
Campaign Wrap Up	\$32,544	One-time

d. Area D / Post Campaign Assessment:

Tasks	Total Cost	Cost Occurrence
Engagement Preparation	\$4,153	One-time
Leadership and External Interviews	\$12,430	One-time
Post-Campaign Gift and Prospect Data Analysis	\$33,900	One-time
<b>Division Optimization</b>		
Program Reviews	\$68,930	One-time
<b>Roadmap</b>		
Analysis and Report Development	\$27,572	One-time
Report Review and Presentation	\$16,216	One-time
<b>Area D Total</b>	<b>\$163,201</b>	One-time

2. Contractor's daily hourly rate per consultant for a full-day of service:

- a. Principal - \$5,085 - \$6,780
- b. Senior Vice President - \$2,486 - \$3,955
- c. Vice President - \$3,690
- d. Associate Vice President – \$2,147 – \$3,390
- e. Executive/Consulting Partner – \$2,260 – \$4,520
- f. Director - \$1,695 - \$2,260
- g. Subject Matter Expert, Digital - \$2,260 - \$2,825
- h. Subject Matter Expert, Communications - \$2,260 - \$2,825
- i. Subject Matter Expert, Decision Science - \$2,260
- j. Subject Matter Expert, Annual Giving - \$2,260 - \$2,825
- k. Subject Matter Expert, Systems and Operations - \$2,034 - \$2,825
- l. Subject Matter Expert, Business Intelligence - \$2,034 - \$2,825
- m. Subject Matter Expert, Prospect Development - \$2,825

- n. Subject Matter Expert, Research – \$1,130 - \$2,034
  - o. Project Associate - \$1,243
3. Purchasing Agency may request consulting work for special projects in addition to the scope of work. Contractor shall provide the university with a quote for the additional work that is in accordance with the daily hourly rates per consultant for a full-day of service. James Madison University will issue a Purchase Order authorizing contractor to proceed with work.
  4. Contractor shall provide a detailed invoice to the Purchasing Agency for time and resources rendered each month on the 15<sup>th</sup> day of the following month. Payment shall be made in accordance with the Virginia Prompt Pay Act.
  5. The first initial term of the contract and the first one-year option renewal period shall be fixed per the pricing schedule. The second optional one-year renewal period may be renewed in accordance with either the CPI-W “other services” category allowance as stipulated in the RFP or capped at 9%, whichever is less.
  6. Contractor shall conduct a wealth screening as part of the giving analysis and projections service during the campaign readiness audit portion of the engagement, at no additional cost.
  7. Contractor’s Reimbursable Travel Expenses:
    - a. Travel that extends 2 days or less shall be limited to the following:
      - Contractor will receive a \$1,300 travel allowance (on-campus or feasibility study interviews) per trip, per consultant.
      - Allowance shall include all airfare, car rental, hotel, meals and any other reimbursable travel fees.
      - Contractor may request the opportunity to review this expense cap at each renewal.
    - b. Travel beyond 2 consecutive days:
      - Hotel/Lodging, Meals, and Incidentals (on-campus or feasibility study interviews) shall be in accordance with the Commonwealth of Virginia’s per diem allowance for lodging, meals and incidental expenses (*M&IE RATE TABLE*) at the time of travel, which can be referenced at:  
<https://www.jmu.edu/financemanual/procedures/4215mie.shtml>.
      - Transportation expenses (air travel, car rental) will be paid at cost upon the contractor providing a documented receipt to the university. Contractor shall book air travel and care rental to ensure expenses remain economical. Air fare shall be reimbursed for coach/standard with no upgrades and car rental shall be reimbursed for standard with no upgrades.
    - c. Contractor shall not book travel arrangements without prior approval from the Purchasing Agency.
    - d. Purchasing Agency will provide onsite travel requests six (6) weeks in advance.

8. Nick Perlick of Bentz, Whaley, Flessner and Associates shall serve as lead counsel and main point of contact for all work under this contract. The university reserves the right to request a change of lead counsel during the course of the contract. BWF shall work to meet this request whenever practical.
9. Additional costs or changes in approved project pricing shall be mutually agreed upon in writing by the Contractor and Purchasing Agency.