



CONTRACT RENEWAL LETTER

Date: May 29, 2026
Contract #: UCPJMU6799
Service: Fundraising Consulting Services
Renewal Period: 7/1/2026 to 6/30/2027
Renewal #: 2 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 travel allowance shall increase from \$1,300 to \$1,500 and all other contract pricing shall be in accordance with the updated pricing schedule 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. Klapproth*

 Katrina A. Klapproth

Name (print)
 COO and Owner 5/29/2026

Title Date Signed

James Madison University
By: *Shanna Devers*

 Shanna Devers, CUPO

Name (print)
 Lead Commodity Contract Officer 5/29/2026

Title Date Signed

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Renewal Period: 7/1/2026 to 6/30/2027

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 Presentation	\$14,916	One-time
*Area A Total (with 40 interviews)	\$308,631	One-time
*Area A Total (with 50 interviews)	\$314,846	One-time

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

Tasks	Total Cost	Cost Occurrence
Comprehensive Campaign Plan <i>Development of a comprehensive campaign plan that manages goal, timing, strategies, roles, and organization needs.</i>	\$20,905	One-time
Communications Plan (Silent Phase) <i>Foundational framework for key messaging, target audiences, communications vehicles and channels, sequencing, and timing for the silent/leadership—thereby providing a roadmap for your communications professional(s).</i>	\$32,318	One-time
Volunteer Structure and Committees <i>BWF counsel will include helping with governance, committee structures, roles, expectations, recruitment, peer solicitation, and agendas.</i>	\$37,290	On-going per year
Prospect Development Strategies <i>BWF helps organizations focus resources where they will generate the greatest campaign return by helping with portfolios, moves management, pacing, and pipeline flow.</i>	\$16,950	On-going per year
Donor Relations and Stewardship <i>BWF helps improve the donor experience through a campaign and the operational aspects related to gift acceptance, diligence, and naming.</i>	\$42,940	On-going per year
Campaign Counting Policies <i>BWF is able to draft campaign counting policies and reporting standard.</i>	\$30,510	On-going per year
Training and Coaching <i>Training and coaching is customized to the audience and need. BWF offers coaching for board members, deans, gift officers, and more. Training includes preparation and delivery/facilitation of 3 half-day training/workshops. Topics TBD.</i>	\$24,860	On-going per year
Ongoing Support and Counsel <i>BWF's strategic counsel helps lead development and senior leaders through the campaign, tracking progress, identifying risks, and building internal campaign stability. This includes all 1:1 meetings/calls and small group sessions,</i>	\$36,160	On-going per year

<i>either virtual or in-person.</i>		
Giving Insight Analysis and Projections Re-run	\$25,000	One-time

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
Communications Plan (Public Phase)	\$32,318	One-time
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 Date Analysis	\$33,900	One-time
Division Optimization		
Program Reviews	\$68,930	One-time
Roadmap		
Analysis and Report Development	\$27,572	One-time
Report Review and Presentation	\$16,216	One-time
Area D Total	\$163,201	One-time

e. Campaign Accelerator Services (Available any phase)

Tasks	Total Cost	Cost Occurrence
Campaign Dashboards <i>Include a full-service build out and deliver of a campaign suite.</i>	\$55,726.40	One-time
Additional Suite <i>Additional custom suites of varying types as needed</i>	\$9,280	One-time
Campaign Maintenance	\$3,480.00	On-going per year
Relationship Mapping Prospect/Donor Profile <i>Ideal for new or re-identified prospects</i>	\$1,160	Per Name
Philanthropy Prospect/Donor Profile <i>Ideal to support new portfolio transitions and quick information</i>	\$290.00	Per Name
Brief Prospect/Donor Profile <i>Ideal to support new portfolio transitions and quick information</i>	\$232.00	Per Name
Events Assessment	\$22,620	One-time

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

- a. Principal - \$5,182 – \$6,909
- b. Senior Managing Vice President - \$4,728 – \$5,095
- c. Senior Vice President - \$2,533 – \$4,030
- d. Vice President - \$3,760
- e. Associate Vice President - \$2,188 – \$3,454
- f. Executive/Consulting Partner - \$2,303 – \$4,606
- g. Senior Director - \$2,364 – \$2,955
- h. Director - \$1,727 - \$2,303
- i. Subject Matter Expert, Digital - \$2,303 – \$2,879
- j. Subject Matter Expert, Communications - \$2,303 – \$2,879
- k. Subject Matter Expert, Decision Science - \$2,303

- l. Subject Matter Expert, Annual Giving - \$2,303 – \$2,879
 - m. Subject Matter Expert, Systems and Operations - \$2,073 – \$2,879
 - n. Subject Matter Expert, Business Intelligence - \$2,073 – \$2,879
 - o. Subject Matter Expert, Prospect Development - \$2,879
 - p. Subject Matter Expert, Research - \$2,073
 - q. Project Associate - \$1,267
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 15th 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 \$1,500 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.