



LAKE COUNTY FOREST PRESERVES  
www.LCFPD.org

Preservation, Restoration, Education and Recreation

**DATE:** March 2, 2020

**MEMO TO:** Jessica Vealitzek, Chair  
Operations Committee

**Agenda Item#** 9.6

Terry Wilke, Chair  
Finance Committee

**FROM:** Katherine Hamilton-Smith  
Director of Public Affairs and Development

**RECOMMENDATION:** Recommend Approval of a Resolution Authorizing Change Order No. 3 to the Contract with Blackbaud, Inc. for Advanced Wealth Analytics and Consulting Services, increasing the Contract Amount by \$11,875.05.

**STRATEGIC DIRECTION SUPPORTED:** Organizational Sustainability

**FINANCIAL DATA:** This Change Order will increase the cost of the existing contract with Blackbaud, Inc. by \$4,375.02 for FY2020 and, if appropriated and budgeted, \$7,500.03 for FY 2021. The funds will be carried over from the Fiscal Year 2019 Budget in General District Development Division account 11354000-701400.

**BACKGROUND:** In Fiscal Year 2018/2019 and again in Fiscal Year 2020, funding was approved in the Development Division budget to develop and implement a comprehensive donor acquisition plan. The purpose of this activity is to strategically engage, solicit, and secure new donors to the Preservation Foundation in support of the endowment campaign and to grow the base of donors to the Forest Preserves.

On September 12, 2017, the District extended, for three years, its contract with Blackbaud, Inc. to continue use of the Raisers Edge NXT donor management software. The District has used this software since establishment of the Development Division in 2006.

Blackbaud, Inc. offers an optional Advanced Wealth Analytics module and consulting services. The module combines existing data on potential Forest Preserve supporters with national giving data, wealth, and demographic attributes to model and predict a prospect's likelihood to give. The existing data and national data will be combined with Blackbaud's consulting services provided under the proposed Change Order to help Development staff understand the information and structure a comprehensive donor acquisition strategy for the District's and Preservation Foundation's endowment campaign.

Blackbaud's project deliverables under the proposed Change Order include data import and modeling and 8 hours of consulting services in spring 2020 and 8 hours of consulting services in spring 2021. Staff will monitor the rate of donor acquisition and revenue generated versus the cost of this investment.

Staff compared the services offered by Blackbaud with similar services offered by other firms. The Blackbaud option is competitively priced and offers the added benefit of integrating directly with Raiser's Edge NXT. Direct integration reduces staff time to export and import data and reduces the likelihood of data entry errors.

The cost of Raisers Edge NXT is based on the number of donor records allowed. In 2018, Change Order No. 2 to the contract, in the amount of \$7,200.00, was approved to increase the limit on the number of donor records from 37,500 to 50,000. The increase was needed due to an increase in the number of donors and prospective donors to the Preservation Foundation of the Lake County Forest Preserves.

In 2017, the District approved Change Order No. 1 to the contract to add RENXT Learn More, a comprehensive training package for use by all software users (\$6,086.53).

Change Orders that, when added to prior change orders to a contract, exceed 20% of the contract price or \$20,000, whichever is less, must be approved by the Board. Because the cumulative cost of change orders to this contract exceeds this allowance, Change Order No. 3 requires Board approval.

**REVIEW BY OTHERS:** Chief Operations Officer, Director of Finance, Chief Development Officer/Executive Director Preservation Foundation, Corporate Counsel.

STATE OF ILLINOIS )  
 ) SS  
COUNTY OF LAKE )

**BOARD OF COMMISSIONERS  
LAKE COUNTY FOREST PRESERVE DISTRICT  
REGULAR MARCH MEETING  
MARCH 10, 2020**

**MISTER PRESIDENT AND MEMBERS OF THE BOARD OF COMMISSIONERS:**

Your **OPERATIONS COMMITTEE** and **FINANCE COMMITTEE** present herewith "A Resolution Approving Change Order No. 3 to the Contract with Blackbaud, Inc. for Advanced Wealth Analytics and Consulting Services" and request its approval.

**OPERATIONS COMMITTEE:**

Date: 3-2-2020  Roll Call Vote: Ayes: \_\_\_\_ Nays: \_\_\_\_  
 Voice Vote Majority Ayes; Nays: 0

**FINANCE COMMITTEE:**

Date: 3-5-2020  Roll Call Vote: Ayes: \_\_\_\_ Nays: \_\_\_\_  
 Voice Vote Majority Ayes; Nays: 0

**LAKE COUNTY FOREST PRESERVE DISTRICT  
LAKE COUNTY, ILLINOIS**

**A RESOLUTION APPROVING CHANGE ORDER NO. 3 TO THE CONTRACT  
WITH BLACKBAUD, INC. FOR ADVANCED WEALTH ANALYTICS  
AND CONSULTING SERVICES**

**WHEREAS**, the Lake County Forest Preserve District (the “District”) and Blackbaud, Inc. (the “Vendor”) entered into a contract (the “Contract”) to provide donor management software and related services (collectively, the “Services”); and

**WHEREAS**, the District and the Vendor desire to approve Change Order No. 3 to the Contract in substantially the form attached hereto (“Change Order No. 3”) to add Advanced Wealth Analytics and Consulting Services to the Contract (the “Additional Services”); and

**WHEREAS**, the Additional Services will combine existing data on potential District supporters with national giving data, wealth, and demographic attributes to model and predict a prospect’s likelihood to donate; and

**WHEREAS**, on September 11, 2015, the District amended the Contract to add additional Services (the “2015 Amendment”); and

**WHEREAS**, the District previously approved Change Order No. 1 and Change Order No. 2 to the Contract;

**NOW, THEREFORE, BE IT RESOLVED** by the Board of Commissioners of the Lake County Forest Preserve District, Lake County, Illinois THAT:

**Section 1: Recitals.** The recitals set forth above are incorporated as a part of this Resolution by this reference.

**Section 2: Approval of Change Order No 3.** Change Order No. 3, in substantially the form attached hereto, is approved, and the 2015 Amendment, Change Order No. 1, and Change Order No. 2 are ratified and approved, for the following reasons:

- a. They are germane to the original Contract, as signed; and
- b. They are in the best interest of the District.

**Section 3: Placement in Contract File.** This Resolution and Change Order No. 3 shall be preserved in the permanent District file of the Contract. This Resolution shall constitute the written determination required by Section 33E-9 of the Illinois Criminal Code, 720 ILCS 5/33E-9.

**Section 4: Effective Date.** This Resolution shall be in full force and effect from and after its passage and approval in the manner provided by law.

PASSED this \_\_\_\_\_ day of \_\_\_\_\_, 2020

AYES:

NAYS:

APPROVED this \_\_\_\_\_ day of \_\_\_\_\_, 2020

\_\_\_\_\_  
Angelo D. Kyle, President  
Lake County Forest Preserve District

ATTEST:

\_\_\_\_\_  
Julie Gragnani, Secretary  
Lake County Forest Preserve District

Exhibit No. \_\_\_\_\_



**Lake County Forest Preserve District  
CHANGE ORDER NO. 3**

**Date:** March 10, 2020  
**Project No:** Donor Management Software  
**Contractor:** Blackbaud, Inc.  
 2000 Daniel Island Dr  
 Charleston, SC 29492-7541

**Original Contract Date:** 6/23/2006

**To the Contractor:** You are hereby authorized to make the following changes, subject to the Contract provisions.

Bulletin No. 1	Increase	\$11,875.05
<b>TOTAL</b>	<b>Increase</b>	<b>\$11,875.05</b>

Original Contract Amount		\$14,059.00
2015 Amendment	Increase	\$14,423.70
2017 Extension	Increase	\$30,615.03
Change Order No. 1	Increase	\$ 6,086.53
Change Order No. 2	Increase	\$ 7,200.00
Change Order No. 3	Increase	\$11,875.05

**REVISED CONTRACT AMOUNT** **\$ 84,259.31**

**Time Extension:** NONE  
**Other Contracts Affected:** NONE

**Recommended By:**

**DATE:** 2/26/2020

Director of Public Affairs and Development

**Approved By:**

Operations Committee

**DATE:** 3-2-2020

Finance Committee

**DATE:** 3-5-2020

Board Approval

**DATE:** \_\_\_\_\_

Executive Director

**DATE:** \_\_\_\_\_

**Accepted By:**

Blackbaud, Inc.

**DATE:** \_\_\_\_\_

**DISTRIBUTION:** EXECUTED ORIGINAL: Purchasing **COPIES:** Project Manager, Contractor  
 (Executed Original is:  Hard Copy  E-Copy) Decrease / No Cost Change /Time Change:  
 Accounting

**Increase:** Munis

**Original PO#** 20180271



**Lake County Forest Preserve District  
Donor Management Software  
CHANGE ORDER NO. 3**

**BULLETIN NO. 1**

**YOU ARE HEREBY AUTHORIZED TO MAKE THE FOLLOWING CHANGES IN THE CONTRACT DOCUMENTS:**

**THE FOLLOWING ITEMS ARE ADDED TO THE CONTRACT DOCUMENTS:**

**Item No. 1:** Addition of Advanced Wealth Analytics Solution and Consulting Services, to be provided in accordance with the Order Form attached to this Change Order.

**Total Increase Item No. 1: \$ 11,875.05**

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**TOTAL CONTRACT INCREASE: \$ 11,875.05**



# Order Form

2000 Daniel Island Drive, Charleston SC 29492-7541

Site ID: 27491  
Order Number: Q-00953878

**Bill to:**  
Preservation Foundation AP AP  
Preservation Foundation of the  
Lake County Forest Preserve  
1899 W Winchester Rd  
Libertyville, IL 60048-5367

**Sold to:**  
R Snyder  
Preservation Foundation of the  
Lake County Forest Preserve  
1899 W Winchester Rd  
Libertyville, IL 60048-5367

Valid Until: 3/13/2020  
Currency: USD  
Payment Terms: NT15

## Subscriptions

### Blackbaud Advanced Wealth Analytics Sol

Price: \$10,749.96/year  
*Billed: Annual \*partial year*  
*Contract term: 19 months*

Year 1: \$4,375.02\*  
Year 2: \$7,500.03

### New order totals:

Year 1: \$4,375.02  
Year 2: \$7,500.03



## General Terms

Enter text here to overwrite the above PO Number or add a note to the invoice: {{add\_es\_:signer1:string(maxlen=35)}}

The fees and terms on this Order Form are valid until 3/13/2020. This Order Form is governed by the [Blackbaud Solutions Agreement](#) and applicable terms and conditions in the [Online Terms and Conditions Center](#), and by signing this Order Form You agree to these terms.

### Renewals:

***Unless You notify Blackbaud in writing of Your desire to cancel at least forty-five (45) days prior to the start of the upcoming renewal term, Your Subscription shall renew for consecutive terms equal in length to the initial term. Renewal fees or Subscription pricing for renewal terms are subject to a reasonable adjustment.***

### Fees, Expenses and Payment:

- a. Fees, Duties, and Taxes. Fees for Solutions are set forth in this Order Form, exclusive of taxes. Unless Blackbaud has a current and valid tax exemption certificate on file, You will be responsible for all applicable taxes.
- b. Expenses. If Blackbaud incurs reasonable travel and living expenses to perform Your Services, You are required to reimburse Blackbaud for such expenses pursuant to Blackbaud's then-current travel policy, available to You upon request.
- c. Invoices. The initial invoice for Your Solutions is issued immediately following Order Form signature. All other invoices shall be issued as follows: (i) invoices for Services will be issued in accordance with the applicable SOW; (ii) pro forma invoices for upcoming Subscription renewals shall be sent to You at least sixty (60) days prior to the start of the renewal term; (iii) and unless terminated in compliance with the Suspension; Acceptable Use Policy (Section 3(a) of the Blackbaud Solutions Agreement), final renewal invoices for Subscriptions will be issued at least thirty (30) days prior to the start of the renewal term.
- d. Payments and Late Payments. Payment is due as stated in this Order Form. All payments are non-refundable except in the event of Our uncured material default under this agreement. If You believe an invoice is inaccurate, You must notify Blackbaud in writing within thirty (30) days from the date of such invoice. Except for amounts subject to a good faith dispute, We may invoice You an interest rate allowable under applicable laws for any outstanding invoice not paid when due.

Our records indicate that You are Tax Exempt. You will not be charged sales tax on Your orders as long as Your exemption certificate has not expired. If it has expired, send the new certificate to: [SalesTaxExemptCertificates2@blackbaud.com](mailto:SalesTaxExemptCertificates2@blackbaud.com).

You acknowledge that certain aspects of Our Solutions interface with and share client content with partner applications purchased by You from third parties ("Partner Applications"). We make no warranty with respect to any Partner Applications, and We shall have no liability should client content become unavailable from such Partner Applications for any reason. Your use and remedies with respect to such Partner Applications shall be pursuant to the applicable third-party agreements in place between You and the third-party provider of the Partner Application.

### Scopes of Work

The Professional and Consulting services charges listed on this Order Form are for this purchase only and are subject to the [Professional and Consulting Services General Terms](#). Information specific to the Professional and Consulting services project, or work, can be found in the applicable Statement(s) of Work (SOW).

### Project Contact Name:

Enter text here to overwrite the above Project Contact Name: {{projConName\_es\_:signer1:string}}

### Project Contact Email:

Enter text here to overwrite the above Project Contact Email: {{projConEmail\_es\_:signer1:isemail}}

**Blackbaud Advanced  
Wealth Analytics Sol**

[https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN\\_AdvancedWealthAnalytics.pdf](https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN_AdvancedWealthAnalytics.pdf)

**Advanced Wealth Analytics**

[https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN\\_AdvancedWealthAnalytics.pdf](https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN_AdvancedWealthAnalytics.pdf)

**ResearchPoint Learn More**

[https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN\\_AdvancedWealthAnalytics.pdf](https://www.blackbaud.com/files/sow/TAADVWLTHMDLASBUN_AdvancedWealthAnalytics.pdf)

Signatures

IN WITNESS WHEREOF, the parties have caused this Order Form to be executed by their duly authorized representatives.

**AGREED:**

Client: **Preservation Foundation of the Lake County Forest Preserve**

**Blackbaud, Inc.**

By: {{\_es\_:signer:signature}}



Name: {{\_es\_:signer:fullname}}

Name: Kevin Mooney

Title: {{\_es\_:signer:title}}

Title: President, General Markets Business Unit

Date: {{\_es\_:signer:date}}

Date: 2/19/2020

(\*Effective Date)

*All proposed modifications, variations, edits, or additions to this Order Form are objected to and deemed material unless otherwise mutually agreed to in writing.*