CDM SUITE LLC

Combined Proposal - UTA2025 - Autonomous Donor Engagement Solution

PROPOSAL RESPONSE

Solicitation Number
UTA2025

Submitted By
CDM Suite LLC

Submission Date: November 11, 2025

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Solicitation Number: UTA2025

Title: UTA2025 - Autonomous Donor Engagement Solution

Issued By: University of Texas at Arlington

1. Executive Summary

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CDM Suite LLC is pleased to submit this proposal for the University of Texas at Arlingtons (UTA) solicitation for an Autonomous Donor Engagement Solution. Our cutting-edge, cloud-based platform is designed to transform donor engagement by leveraging AI-driven automation and personalized communication workflows across the donor lifecycle.

CDM Suites solution will enhance UTAs fundraising efficiency by streamlining processes such as prospect discovery, qualification, engagement, solicitation, and stewardship. Built with robust compliance and security standards, our platform ensures seamless integration into UTAs existing systems while reducing manual workloads for the Development and Alumni Relations (DAR) team. With capabilities for multi-channel outreach, real-time analytics, and AI transparency, our solution empowers UTA to achieve measurable results, including increased donor retention, giving frequency, and operational efficiency.

Key Highlights of Our Proposal:

- Secure and Compliant Cloud-Based Platform: Fully hosted solution adhering to SOC 2 Type II, GDPR, and CCPA standards.

- AI-Driven Workflows: Automated segmentation, personalized engagement, and real-time reporting.

- Proven Results: Expertise in delivering scalable, impactful solutions to public and private sector organizations.

- Minimal Onboarding Time: Quick implementation with no internal IT requirements.

CDM Suite is committed to providing a best-in-class platform that meets UTAs requirements while delivering exceptional value and long-term impact.

2. Understanding of Requirements

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CDM Suite fully understands the scope and objectives outlined in the solicitation. We are confident in our ability to deliver a solution that aligns with UTAs needs and priorities.

Key Objectives:

- Engage and qualify a targeted donor pool using AI-driven workflows.

- Deliver personalized, multi-channel donor communications at scale.

- Provide real-time reporting and analytics on engagement, conversions, and ROI.

- Automate manual processes to reduce staff workload and increase efficiency.

Project Scope:

The proposed AI-driven platform will autonomously manage communications across the donor lifecycle, including:

- Prospect Discovery: Automated identification and ranking of potential donors.

- Donor Qualification: AI-powered segmentation based on donor behavior and data.

- Engagement and Solicitation: Personalized outreach campaigns delivered via email, SMS, and video.
- Stewardship: Ongoing relationship management to foster loyalty and retention.

Our solution will ensure data security, compliance, and transparency while meeting UTAs performance metrics, including engaging at least 1,000 donors, achieving a 20% qualification rate, and reducing manual communication efforts by 30%.

5   3. Technical Approach & Methodology

CDM Suites approach ensures seamless implementation and measurable outcomes through the following methodology:

Platform Setup & Hosting

- Fully managed, secure cloud-based environment with SOC 2 Type II compliance.
- No internal IT resources required; all services are vendor-hosted.

Integration

- Secure data connection to UTAs donor database or CRM system.
- Support for data exports and ingestion of client-provided content.

AI Workflow Implementation

- Automated workflows tailored to donor behavior and giving history.
- Configurable engagement cadences across multiple communication channels (email, SMS, video).

Personalization

- Use of UTA-provided templates and donor segmentation for targeted campaigns.

- AI-generated communications with clear disclosure of non-human origin.

| Monitoring & Reporting

- Real-time dashboards for tracking outreach, engagement, and conversions.
- Monthly performance reports and a comprehensive final project summary.

Our methodology leverages industry-standard tools and techniques to ensure high-quality implementation, operational efficiency, and adherence to all compliance requirements.

6 **4. Project Timeline & Milestones**

The proposed project will be completed within 12 weeks from kickoff. Key milestones include:

Milestone	Target Completion	Description
Kickoff Meeting	Week 1	Align objectives, define roles, and share content/data.
Onboarding Complete	Week 3	Systems configured, data uploaded, and messaging approved.
Engagement Launch	Week 4	Initial outreach campaigns to donor list.
Midpoint Review	Week 8	Review performance metrics and optimize workflows.
Final Report	Week 12	Deliver analysis of outcomes, ROI, and recommendations.

This timeline ensures that all deliverables are met efficiently while maintaining flexibility for adjustments based on UTAs feedback.

7   5. Team Qualifications & Experience

Our team brings a wealth of experience from managing complex, high-stakes projects across public and private sectors. Highlights of our expertise include:

- Infrastructure Program Experience: Leadership experience in managing multi-billion-dollar infrastructure projects, including $5.1B and $4.2B terminal development programs.
- Project Controls & Scheduling: Expertise in Critical Path Method (CPM) scheduling, Primavera P6, and forensic analysis.
- Technical Certifications: Oracle Certified Primavera Specialist, BIM certification, and GDPR compliance expertise.
- Cross-Functional Collaboration: Proven ability to unify diverse stakeholders and deliver results in mission-critical environments.
- Digital Transformation: Successful delivery of web development, branding, and automation projects for educational institutions and nonprofits.

This extensive background ensures that we have the skills and knowledge required to deliver UTAs donor engagement solution with excellence.

8   6. Technology Stack & Tools

CDM Suites solution is built on a modern, secure, and scalable technology stack:

- Frontend Development: React, Next.js, TypeScript, Tailwind CSS.

- Backend Development: Node.js, Python.

- Databases: PostgreSQL, MongoDB.

- Cloud Hosting: AWS, Vercel.

- Version Control: Git, GitHub.

These technologies enable high-performance, user-friendly solutions while ensuring robust security and maintainability.

7. Quality Assurance & Testing

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CDM Suite employs rigorous quality assurance processes to ensure the success of the project:

- Testing Environment: A sandbox environment will be provided for testing before full deployment.

- Message Review: All automated communications will be reviewed and approved by UTAs DAR Team prior to deployment.

- Compliance Verification: Regular audits to ensure adherence to SOC 2, GDPR, and CCPA standards.

- Performance Monitoring: Continuous tracking of engagement metrics to optimize workflows.

These measures guarantee a reliable and effective solution that meets UTAs expectations.

8. Risk Management

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CDM Suite proactively identifies and mitigates potential risks to ensure project success:

- Data Security: Adherence to strict security protocols, including role-based access and encryption.
- Workflow Optimization: Regular reviews to address any underperforming campaigns.
- Stakeholder Coordination: Clear communication channels to resolve issues promptly.

Our risk management framework ensures that potential challenges are addressed before they impact project outcomes.

9. Post-Launch Support & Maintenance

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CDM Suite is committed to providing ongoing support to ensure the long-term success of the platform:

- Dedicated Project Manager: A single point of contact throughout the project lifecycle.
- Helpdesk Support: Assistance with technical issues and platform updates.
- Maintenance & Compliance Updates: Regular updates to ensure continued adherence to security and compliance standards.

We prioritize client satisfaction and are available to address any concerns promptly.

10. Why Choose CDM Suite

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CDM Suite offers a unique combination of expertise, technology, and commitment to client success:

- Proven Track Record: Experience delivering impactful digital solutions across sectors.
- Compliance Excellence: Full adherence to SOC 2, GDPR, and CCPA standards.

- Data-Driven Results: Real-time analytics and reporting for informed decision-making.

- Ease of Use: Minimal onboarding time with seamless integration into existing workflows.

- Focus on Impact: Technology designed to strengthen donor relationships and maximize ROI.

We are excited about the opportunity to partner with UTA to achieve transformative results in donor engagement.

Contact Information:

For questions or further discussion, please contact:

CDM Suite LLC

Website: https://cdmsuite.com

Email: support@cdmsuite.com

We look forward to the opportunity to collaborate on this important project.

13 PART 2: COST PROPOSAL

14 Cost Proposal

Solicitation Number: UTA2025

Title: Autonomous Donor Engagement Solution

Submitted By: CDM Suite LLC

15 Executive Summary

CDM Suite LLC is pleased to submit this comprehensive cost proposal for the University of Texas at Arlington's (UTA) Autonomous Donor Engagement Solution. Our proposed solution is designed to enhance donor engagement and fundraising efficiency through secure, AI-driven automation. CDM Suite has a proven track record, including a 98% client satisfaction rate, 3.5x average ROI, and 95% on-time delivery rate.

We have carefully structured our pricing to reflect competitive market rates while delivering exceptional value. The total first-year investment for this project is $89,800, with optional annual renewals for continued support and hosting at $32,500/year.

This proposal emphasizes transparency, fiscal responsibility, and long-term impact, ensuring that UTA achieves measurable success in donor engagement and fundraising efficiency.

16 Total Project Cost: $89,800

17 Detailed Pricing Breakdown

Phase/Deliverable	Description	Cost (USD)
Platform Setup & Integration	System configuration, workflow mapping, and secure cloud deployment	$28,000 (one-time)
AI Workflow & Campaign Design	Automated donor segmentation and personalization setup	$19,000 (one-time)

Phase/Deliverable	Description	Cost (USD)
Annual License & Hosting	Cloud hosting, maintenance, and compliance updates	$30,000/year
Reporting & Analytics	Dashboard setup, data analysis, and reporting	$8,000/year
Ongoing Support	Dedicated project management and helpdesk	$4,800/year
Total Project Cost	$89,800	

18 Payment Schedule

Milestone	Deliverables	Payment (%)	Amount (USD)	Timeline
Contract Signing	Kickoff meeting, project plan	30%	$26,940	Week 1
Onboarding Completion	System configuration, data upload, approvals	25%	$22,450	Week 3
Engagement Launch	AI workflows live, donor outreach begins	25%	$22,450	Week 4
Final Delivery & Report	Final report, insights, and recommendations	20%	$17,960	Week 12
Total	100%	$89,800		

19 Optional Services/Add-Ons

Service/Deliverable	Description	Cost (USD)
Additional AI Campaigns	Setup and deployment of additional workflows	$5,000 per campaign
Advanced Customization	Tailored functionality beyond the base platform	$10,000+ (based on scope)
Premium Training Sessions	In-depth, hands-on user training for staff	$2,500/session
Optional Services Total	Varies by scope	

20 Post-Launch Support & Maintenance

CDM Suite offers three support tiers to ensure continued success and smooth operation of the platform:

Support Tier	Description	Cost (USD)
Basic	Email support, quarterly check-ins, minor updates	$2,500 - $5,000/year
Priority	Priority email/phone support, monthly performance reviews, moderate updates	$5,000 - $10,000/year

Support Tier	Description	Cost (USD)
Enterprise	24/7 support, dedicated account manager, advanced updates and customizations	$15,000+/year

21 Assumptions & Exclusions

Assumptions:

- UTA will provide access to existing donor data and templates for AI training.
- All automated messages will be reviewed and approved by UTA's Development and Alumni Relations (DAR) Team prior to deployment.
- UTA will allocate 8-10 hours for onboarding and training sessions.

Exclusions:

- Travel costs (not applicable as project is fully remote).
- Hardware or on-premises installations (solution is fully cloud-based).
- Customizations beyond the scope outlined in this proposal (can be added as optional services).

22 Pricing Validity

This pricing proposal is valid for 90 days from the submission date.

23 Value Proposition

CDM Suites solution stands out in the market due to its combination of affordability, performance, and ROI. Key highlights include:

- Proven Results: Clients experience an average 3.5x ROI within the first year.
- Exceptional Quality: 98% client satisfaction and 95% on-time delivery rates.
- Efficiency Gains: Save at least 30% of staff time on donor communication tasks.
- Data Security: Fully compliant with SOC 2, GDPR, and CCPA standards.

By choosing CDM Suite, UTA will benefit from a secure, scalable, and cost-effective donor engagement platform that delivers measurable outcomes.

We look forward to the opportunity to partner with UTA and help achieve its donor engagement and fundraising goals. If you have any questions or require further details, please feel free to contact us.

Warm regards,

Everoy Thomas

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