



# UNIVERSITY OF SOUTH CAROLINA

AMENDMENT NO. 1 TO SOLICITATION

TO: ALL VENDORS

FROM: Charles Johnson, Procurement Manager

SUBJECT: SOLICITATION NUMBER: USC-RFP-3279-CJ

DESCRIPTION: Development and Alumni Database Millennium Replacement

DATE: April 27, 2018

This Amendment No. 1 modifies the Request for Proposals only in the manner and to the extent as stated herein.

Script that the University wants responsive offerors to adhere to when making their presentations/demonstrations to the evaluation committee.

The Deadline for Receipt of Proposals (Bid Opening) has been changed from May 15, 2018 at 3:00 PM to May 23, 2018 at 3:00 PM.

The schedule for the on-site presentations/demonstrations of their proposed solutions from all responsive offerors to the solicitation to the evaluation committee has been changed from the week of June 4<sup>th</sup>, 2018 to begin the week of June 18<sup>th</sup>, 2018.

The date that responsive offerors will be notified by the Procurement Officer for the solicitation via email that they have qualified to provide on-site presentations/demonstrations to the evaluation committee and what day beginning the week of June 18, 2018 they are scheduled to provide their on-site presentation/demonstration to the evaluation committee has been changed from May 24, 2018 to June 1, 2018.

**BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 1 IN THE SPACE PROVIDED BELOW AND RETURN IT WITH THEIR BID RESPONSE. FAILURE TO DO SO MAY SUBJECT BID TO REJECTION.**

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Name of Offeror

\_\_\_\_\_  
Date

**RESPONSIVE OFFERORS ARE TO ADHERE TO THE FOLLOWING SCRIPT WHEN MAKING THEIR PRESENTATIONS/DEMONSTRATIONS TO THE EVALUATION COMMITTEE DURING THE EVALUATION PHASE OF THE SOLICITATION**

**Script for all Responsive Offerors:**

Outline:

1. General Session (high level):
  - i. Duration: 2 hrs (recommended maximum allotment of time)
  - ii. Audience: Executive Committee, Evaluation Committee members as well as Functional Area (FA) Subject Matter Experts
    - a. Company/Overview
    - b. Company's Client Base
    - c. Experience in Higher Education
    - d. Success stories
      - Tell us about your most recent system conversions and from what system did your client(s) convert from.
      - Provide any experience you have had with client converting from Millennium.
        - Talk about lessons learned through the conversion process.
    - e. Core functionality: How does your proposed solution foster partnership and collaboration to enable us to work closely together.
    - f. Professional Services
    - g. Support (Technical, etc)

*10-minute break - Functional Areas (FA), subject matter experts will attend each session. Question and answer segments will occur within each FA team discussion.*

2. Advancement Services:
  - i. Duration: 1.5 hrs (recommended maximum allotment of time)
  - ii. Audience: Advancement Services, and Foundations
    - a. Gift and Records Services (30 minutes; recommended maximum allotment of time):  
Demonstrate how the Gift Processing and Biographical Records can benefit from using the proposed system to stay in compliance with CASE standards and IRS regulation.  
Compare and contrast the capabilities of the General Ledger in the proposed system and the Integration to the Accounting system.
    - b. Prospect Management & Prospect Research Services (30 min; recommended maximum allotment of time)  
Demonstrate how the proposed system support tacking prospects and strategies and allows for collaboration between all units' fundraisers and the prospect development teams.
    - c. Data management and analytics (15 min; recommended maximum allotment of time)

Exhibit available options for data management and reporting, including import functions and integrations with external sources as well as reporting and dashboarding and datawarehousing

- d. System administration (15 min; recommended maximum allotment of time)  
Show system administration capabilities, including system performance, access control and business continuity and compliance with applicable data privacy policies

3. Annual Giving:

- i. Duration: 30 min (recommended maximum allotment of time)
- ii. Audience: Annual Giving, Athletics and Marketing & Communications

Demonstrate the proposed system's capabilities in tracking direct marketing efforts with multi-channels (email, phone, mail, etc) as well as securing gifts from all these channels and providing the mechanisms for managing the donors retention and new acquisition.

4. Alumni Engagement and Event Management:

- i. Duration: 30 min (recommended maximum allotment of time)
- ii. Audience Alumni Relations and Special Events

Exhibit the proposed system functionality for Alumni and volunteer engagement, chapter and clubs' management, membership management and event management.

5. Donor Stewardship/Relations and Donor Recognition:

- i. Duration: 30 min (recommended maximum allotment of time)
- ii. Audience: Donor Relations and Annual Giving

Provide an overview of the possibilities of the proposed system for managing stewardship strategies as well as endowment and scholarship tracking and reporting.

6. Major Gifts, Planned Gifts, Principal Gifts, and Corporate and Foundation Relations

- i. Duration: 30 min (recommended maximum allotment of time)
- ii. Audience: All DoD fundraisers

Provide an overview of the Fundraiser experience with specific on planned giving area and Corporate and Foundation area.

7. Information Technology & IT security

- i. Duration: 30 min (recommended maximum allotment of time)
- ii. Audience: DoIT (Division of Information Technology) and ISO

Present the hosting options, the security compliance for each option and how does your proposed system can integrate with other systems university information system such as Student System, Athletics Ticketing systems, etc.

Offeror's presentation/demonstration concludes.

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