UNIVERSITY OF SOUTH CAROLINA

AMENDMENT NO. 2 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: May 8, 2018

This Amendment No. 2 modifies the Request for Proposals only in the manner and to the extent as stated herein.

Vendor questions and answers.

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 2 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

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR A:

QUESTION # 1: As we are a South Carolina based company do we have to complete the non-resident tax form?

ANSWER: No, the non-resident tax form (Dept. of Revenue form I-312) does not have to be completed by in State vendors such as South Carolina based companies.

QUESTION # 2: Just to confirm vendors should include sample contracts but make sure we label all pages we attache as "sample only".

ANSWER: Yes, if offerors wish to include sample contracts that they want the University to consider, then they should label each page of the sample contracts "SAMPLE". Please disregard the first bullet on the Offeror's Checklist on page 58 of the solicitation. Refer to the Legal Agreements Included With Bids Must Be Clearly Labelled "SAMPLE" clause in Section II-B of the solicitation.

QUESTION # 3: Regarding section 3.2.6 Software development plan, **interfaces documentation, data synchronization**, and replication plans, etc.
We would like to confirm that **USC DOES NOT** want vendors to scope out integrations to ANY other USC systems (Finance, SIS, document management etc).
- USC does want to know what experience the vendor has with certain systems and USC will provide a list of "potential" future integrations needed for the Millennium CRM replacement solution.
- Here are some of the systems it would be helpful to know what USC is currently using:
  - Phonothon system (do you use Ruffalo Noel Levitz (AKA CampusCall)?
  - Student Information System (Banner, PeopleSoft etc.)
  - Financial System that Advancement CRM would eventually need to post gifts to?
  - Human Resource system?
  - Online giving, profile updates and events?
  - Prospect Research System you are currently using?
  - Scholarships Management?
  - Document Management?
  - Stewardship and naming opportunities?
  - Reporting and visualization for alumni and development staff?
  - Any others that we did not include that may need to be integrated with at some future date?

ANSWER:

Potential Future Integrations	Potential System for Future Integrations	Description
Integrated web platform for alumni/donor engagement	iModules EventBrite MailChimp Emma Constant Contact	Integrated web solution that support an online community, securely accepts various types of revenue transactions, credit card, pledge installments, recurring billing, event registration, allow for self-reporting of bio/demo updates and communications preferences, ability to e-blast based upon query-based criteria with the CRM.
Integrated data health/maintenance	NCOA	Ability to process CASS and NCOA address updates within CRM. Ability to process lost constituent scrubs. Provide reports/scorecards on data health.
Integrated Prospect Research	ResearchPoint	Ability to incorporate wealth indicators for prospects within the CRM application.
Integrated Athletics Ticketing System	Ticketmaster ARCHTICS	Capability to provide two-way data sync between the CRM and athletic ticketing system that includes bio/demo updates of matched constituents, priority ticket and seating data.
Integrated telemarketing phonathon	RNL CampusCall	Ability to automate process to send data back and forth between the CRM and CampusCall, e.g. pledges, outright gifts, and constituent bio/demo updates.
Integrated scholarship management information system	Academic Works	Ability to interact and exchange data two ways to include student information and scholarship awarded and related donor information.
Integrated crowdfunding	Scalefunder	Ability to integrate crowdfunding and peer-to-peer data with the CRM.
Integrated Alumni Engagement System	iModules	Ability to seamlessly integrate the passing of data to and from iModules online engagement system on an automated or manual basis.
Integrated data quality, data profiling and data import system	Alteryx	Ability to leverage external software to import data into various batch types, e.g. bio/demo, revenue, event participate, designation.
Integrated Faculty and Staff system	PeopleSoft	Ability to integrate with the University HR data system and payroll deduction data.
Integrated Giving Day system	Amplo Advancement	Ability to integrate with cloud-based platform for Giving Day campaign.

Integrated Social Media platforms	LinkedIn, Facebook, Twitter	Ability to incorporate social media data into the CRM application.
Integrated Advocacy support system	Aristotle	Ability of incorporate political district, congressional house and Senate data to support alumni advocacy.
Integrated Student System	Banner	Ability to interact and exchange data with student system information.
Integrated Accounting system	Financial Edge	Ability to interact and exchange data with GL system in our University Foundations

QUESTION # 4: Does USC want Single Sign-On (SSO authentication) as part of the pricing proposal/solution that vendors propose?

ANSWER:
Yes. SSO as well as two factor authentication are desired but not mandatory.

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR B:

QUESTION # 1: How many users are administrative users and how many users are basic users?

ANSWER:
The ultimate system administrator role will be limited to just 2 or 3, but the solution is expected to provide a RBAC to allow for different levels of system administration that will be defined by SMEs during design sessions based on RACI matrix defining the role that each user is going to play. Total users will be around 250.

QUESTION # 2: Who will be responsible for migrating the existing data to the new solution?

ANSWER:
The scope of this project includes the complete conversion of the legacy database to the new system database. The selected offeror (contractor) is responsible and accountable for the migration of the existing database.

QUESTION # 3: Is an external portal/website for donors required to allow donors to securely log in to and perform certain activities such as online payment, event registration, etc.?

ANSWER:
The existing external online forms do not require a donor to login before they can submit a gift or register for the event, but the option to allow users to login and save to reuse their information or review their information that we have about them is highly desirable

QUESTION # 4: What existing systems will need to integrate with the new solution?

ANSWER:
Reference the RFP section III.
    C. <u>University's Expectation of New System Advantages</u>

- **Integrated data screening and scrubbing services for modeling, wealth and address validation**
- **Large volume direct mail segmentation and analysis**
- **Online web form for online giving, membership, event registration, and profile update and engagement tools as part of system**
- **Open standards for ease of integration with other systems**
- **Open technology to provide means to modify/enhance solution**
- **Out-of-box integration with mapping tools for trip planning**
- **Reminders and ticklers for activities**
- **Robust integrated event management tool**
- **Role-based access control**
- **Scholarship recipients tracking**

F. <u>Deliverables out of scope</u>

- **Information from colleges/units shadow databases will not be converted to the new solution. All data will need to be imported into the Millennium database before the conversion phase start date.**
- **Alignment with the mission of The University of South Carolina and My Carolina Alumni Association is the primary goal while others will be important but secondary considerations for the implementation.**
- **Current resources/technology upgrades are out of the scope of this project. This is a donor system "Millennium" database conversion project.**

QUESTION # 5: Does the University have a budget in mind for this solution?

ANSWER:
Yes.

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR C:

QUESTION # 1: Of the roughly 100 identified users, what is the breakdown between system administrators and functional users?

ANSWER:

The ultimate system administrator role will be limited to just 2 or 3, but the solution is expected to provide a RBAC to allow for different levels of system administration that will be defined by SMEs during design sessions based on RACI matrix defining the role that each user is going to play. Total users will be around 250. The 100 users are not the number of identified users and should not be considered as part of the requirements.

Reference the RFP section III.

- **Role-based access control**

QUESTION # 2: The RFP indicates no shadow databases will be converted to the new solution. Please confirm whether the current Millennium database holds information for USC in Columbia and the seven satellite campuses in one database today so there will only be one legacy source database to convert?

ANSWER:
The scope of this project is limited to the conversion from Millennium database.
Please reference the RFP section III starting page 14.

F. **Deliverables out of scope**

- **Information from colleges/units shadow databases will not be converted to the new solution. All data will need to be imported into the Millennium database before the conversion phase start date.**

QUESTION # 3: What is the planned date for your next capital campaign? Are you in the quiet phase?

ANSWER:
The planned date for the next capital campaign is to be determined. No.

QUESTION # 4: What financial accounting, human resources, and SIS solution is currently in use? What annual fund calling system is currently in use by the University? Do you want to continue to use this solution?

ANSWER:
QuickBooks, Financial Edge, PeopleSoft, Banner, Campus Call. We are a Ruffalo Noel Levitz client and use their CampusCALL software for annual fund calling. Yes, there are no current plans to change phone vendors

QUESTION # 5: Please clarify whether you are looking for a hard copy of the redacted proposal, or only an electronic copy of the redacted proposal.

ANSWER: I would prefer to receive both a hard copy of the offeror's redacted proposal and an electronic copy of the offeror's redacted proposal.

THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR D:

1. Why undertake this system replacement now? What is the compelling event? Is it a renewal deadline for your current system(s)? Are there particular board initiatives or strategic goals you need to address?

ANSWER:

Please reference the RFP section III starting page 14

A. Overview

The University of South Carolina is pleased to submit this Request for Proposals (RFP) to support the University in preparation for its next comprehensive capital campaign and to position the institution for long term success in fund raising, alumni affairs and strategic communication with alumni, parents, friends and other constituents. We seek to improve the constituent experience, drive alumni engagement and enhance donor satisfaction, while supporting staff to embrace and benefit from a new Advancement Constituent Relationship Management (CRM) System. Simultaneously, we seek to provide the University with an advanced, industry-leading system with sustainable benefits towards strategic alumni and donor engagement.

The project will replace the university's current system, Millennium, and provide an improved Information System (IS) that will more effectively support the work of the Division of Development, My Carolina Alumni Association and the Office of Communications and Public Affairs.

The goal is to implement a comprehensive Advancement Constituent Relationship Management (CRM) system in time for the advent of the next University capital campaign and to integrate the new system under new and existing business policies, procedures and internal processes to significantly enhance fundraising results on an annual basis, during a capital campaign, and while positioning the university for future success.

B. The Objective

- **The University of South Carolina plans to implement an enterprise solution for the University's next capital campaign and for the long-term benefit of the University. This will provide industry leading-edge support to the University's Division of Development, My Carolina Alumni Association and the Office of Communications and Public Affairs for the identification, engagement, cultivation, solicitation, and stewardship of alumni, donors, and friends of the University. The solution you propose should consist of the Advancement CRM functionality including back office operations, fundraising and development, marketing, online and strategic communications, alumni programming and event management.**
- **Organizing vast amounts of data has become a requirement for cultivating ongoing relationships with alumni and friends. The implemented solution must be able to manage a diverse range of constituents defined by multiple relationships and affiliations. With**

this increase of data, the proposed solution must be an efficient system able to improve workflow for staff, volunteers, and the University's campuses, schools, colleges, and units.

- This new system will help The University of South Carolina meet new performance and accountability requirements, which will be the cornerstone of long-term fundraising success. The awarded solution implemented will support data collection and management based on the best practices of the higher education fundraising industry. In addition, the awarded solution will be able to monitor performance goals and respond to the demands of donors, state and federal agencies and industry standards with more accountability than our current system.

- The immediate objective of this project is to ensure that the University's Division of Development and My Carolina Alumni Association have an adequate information management system to carry out the responsibilities of annual fundraising, alumni programming, and the preparation and implementation of the next university capital fundraising campaign.

- In addition, it is also an objective of this project to create an information management infrastructure that supports the University's Division of Development, My Carolina Alumni Association, the Office of Communications and Public Affairs and other engaged partners into the future beyond the next capital campaign.

C. The Opportunity

- Putting knowledge in the hands of development staff allows the University's Division of Development to more effectively identify, cultivate, and steward donors. This knowledge will also assist the My Carolina Alumni Association staff in programming and other activities to effectively engage alumni with the university and each other.

- A state of the art information system for The University of South Carolina, the Division of Development, My Carolina Alumni Association and the Office of Communications and Public Affairs and all other university stakeholders will:

  - Improve data integrity
  - Create easy and better user interfaces
  - Replace workarounds and shadow systems
  - Provide core processes that consistently work
  - Adopt best practices - not merely a technology project
  - Support campaigns
  - Drive integration of fundraising efforts
  - Enhance reporting and introduce analytics
  - Improve response time for customer requests
  - Re-engineer and improve business processes
  - Improve upon known weaknesses of existing system
  - Provide for rapid training for staff on new system

2. Has this initiative already been budgeted? Can you share what the budget is? Is there a particular budget cycle when the funds will be allocated and need to be spent?

ANSWER:
Yes. No. Fiscal Year.

3. Ideally, when would you like to have the new system live by?

ANSWER:
The maximum amount of time for the contractor to implement its solution is eighteen (18) months from the commencement of the contract term.

4. Who is involved in the decision-making process for this initiative, and who has final say?

ANSWER:
For the oversight, two committee are to be formed:

A- **Project Executive Committee: All members of the Project Executive Committee will assemble in periodical basis or as needed for either an update of project progress or a resolution of an escalation by the project executive sponsor and the project manager.**

B- **Business Process Owners Committee: The BPOC will be led by the project executive sponsor and facilitated by the project manager. Representatives from all functional areas will form this committee as detailed below. The RACI matrix will be developed to define responsibility and accountability of each BPOC member/unit as follow:**

   1. Central Development Major and Principal Gifts
   2. Development Colleges/units
   3. Athletics Development
   4. Development Regional Campuses
   5. Annual Giving
   6. Alumni Relations
   7. Donor Relations and Stewardship
   8. Prospect Management
   9. Advancement Services
   10. Foundation's Finance and Accounting
   11. Special Events office
   12. Communications and Public Affairs
   13. USC business office
   14. DolT

5. To what degree are you looking to revise your current business processes as part of this system change, versus map the system to your current processes?

ANSWER:
We are willing to adjust our business process to meet industry best practices if already configured or configurable in the new system. We will need to continue to stay in compliance with IRS regulation, State and University policies. Please reference the RFP section III starting on page 14.

All federal and state legislation and regulation, industry standards, and University of South Carolina policies, procedures, and guidelines, will be followed to ensure compliance, including those associated with security, information privacy, credit card processing standards, and sensitive data elements.

6. Do you have documentation of your current business processes that you can share?

ANSWER:
Yes. We can share upon awarding contract

What current systems are being used for:
      a. Fundraising and Development
      b. Membership management
      c. Gift processing
      d. Event management
      e. Volunteer management
      f. Fulfilment
      g. Marketing
      h. Any other system in scope
ANSWER:
      a. Fundraising and Development: Millennium
      b. Membership management: Millennium
      c. Gift processing: Millennium
      d. Event management: Millennium, EventBrite, iModule
      e. Volunteer management: Millennium
      f. Fulfilment: Millennium
      g. Marketing: N/A
      b. Any other system in scope: Millennium is the only system in scope.

7. Which of these systems are to be replaced?
      a. For each system to be replaced, can you share information about current data structures and record counts for migration?

ANSWER:
Millennium is the only system in scope. Please reference the RFP section III on page 14

Current resources/technology upgrades are out of the scope of this project. This is a donor system "Millennium" database conversion project.

    b. Do you have current staff members who are experts in your current systems and the data and processes they support?

ANSWER:
Yes.

8. Which of these systems are to be included as an integration?

ANSWER:
Millennium conversion is the only system conversion in scope. Please reference RFP section III on page 14

The awarded solution will support fundraising efficiency by providing and/or enabling:

- **A comprehensive view of the total relationship of each donor, including engagement activities, event attendance, annual fund appeals, major gifts, planned gifts and corporate and foundation gifts that can be tracked to each donor**
- **An integrated means to monitor multiple relationships with corporations and foundations including a proposal tracking system**
- **Annual Fund multi-channel segmentation, management and tracking tools**
- **Broad range of ways to consume information**
- **Communications via web and ability to track responses**
- **Comprehensive prospect and campaign management tool sets**
- **Customizable workflow**
- **Day-to-day reporting and comparison against established goals and metrics**
- **Ease of use through dashboards and alerts in which to push information**
- **Easy integration with a wide range of off-the-shelf CRM solutions and can enable the Division of Development to fully realize the benefits of improved integration throughout the entire campus Information systems**
- **Elimination of multiple data silos or systems**
- **End users with the ability and tools to pull meaningful information from the system**
- **Enhanced donor engagement through reliable and sophisticated technology platforms that can support future fundraising techniques**

- **Full profile information of donor behavior**
- **Functionality and access via mobile devices**
- **Integrated data screening and scrubbing services for modeling, wealth and address validation**
- **Large volume direct mail segmentation and analysis**
- **Online web form for online giving, membership, event registration, and profile update and engagement tools as part of system**
- **Open standards for ease of integration with other systems**
- **Open technology to provide means to modify/enhance solution**
- **Out-of-box integration with mapping tools for trip planning**
- **Reminders and ticklers for activities**
- **Robust integrated event management tool**
- **Role-based access control**
- **Scholarship recipients tracking**
- **Solutions to help businesses stay ahead of constituent experience satisfaction trends**
- **The ability to integrate business analytics by role**
- **The ability to upgrade with little impact to daily business processes**
- **The development of a future strategy for robust reporting, analytical, and business intelligence capabilities that can provide the monitoring and insight needed for all three organizations**
- **The training and support for this new solution that ensures our staff can ramp up quickly and realize concrete improvements in constituent experience satisfaction, and fundraising metrics.**

F. Deliverables out of scope

- **Information from colleges/units shadow databases will not be converted to the new solution. All data will need to be imported into the Millennium database before the conversion phase start date.**
- **Alignment with the mission of The University of South Carolina and My Carolina Alumni Association is the primary goal while others will be important but secondary considerations for the implementation.**
- **Current resources/technology upgrades are out of the scope of this project. This is a donor system "Millennium" database conversion project.**

9. How many system users are there in each area, and in what roles (i.e. how are you staffed around these systems?)

ANSWER:

The ultimate system administrator role will be limited to just 2 or 3, but the solution is expected to provide a RBAC to allow for different levels of system administration that will be defined by SMEs during design sessions based on RACI matrix defining the role that each user is going to play. Total users will be around 250.

10. How would you rate the readiness for system change among these users?

ANSWER:
To be determined.

11. What system functions are carried out by non-staff (volunteers, third-party vendors)?

ANSWER:
None.

12. How many membership levels/giving levels exist?

ANSWER:
13 alumni memberships levels; over 50 giving levels.

13. Have you seen any product demonstrations of a potential solution?

ANSWER:
Yes.

14. What automated email sequences (i.e. drip campaigns) do you currently have? Is the ability to do complex marketing journey an important need?

ANSWER:
We currently do not have the capability to create automated email sequences. This would be a need in the new system

15. What is your monthly average email volume?

ANSWER:
About 600,000 emails per month. However, this number varies greatly depending on the time of year.

16. Is there a desire to email the same person at various email addresses based on the type of email being sent, or just the need to track multiple email addresses?

ANSWER:
No.

17. Is offline gift entry handled internally or externally?

ANSWER:
Internally.

18. Does the system need to be able to directly process offline credit card gifts or is that handled externally?

ANSWER:
Yes.

19. What are your current monthly volumes for offline gift entry and online gifts? What is your total number of automated recurring gifts?

ANSWER:
Membership joins/renewals: 350
Event forms for purchasing tickets are used per year: 30 – varies greatly on a monthly basis
Offline gift: 13,750
Online gift: 750
Reoccurring gift: 300

20. How many gift officers do you have?

ANSWER:
80.

21. Do you have established processes for Moves Management? Planned Giving? Corporate Underwriting?

ANSWER:
Yes.

22. Are you looking for a point solution, or exploring a platform to potentially build in the future?

ANSWER:

Please reference the RFP section III starting page 14

- **The University of South Carolina plans to implement an enterprise solution for the University's next capital campaign and for the long-term benefit of the University. This will provide industry leading-edge support to the University's Division of Development, My Carolina Alumni Association and the Office of Communications and Public Affairs for the identification, engagement, cultivation, solicitation, and stewardship of alumni, donors, and friends of the University. The solution you propose should consist of the Advancement CRM functionality including back office operations, fundraising and development, marketing, online and strategic communications, alumni programming and event management.**
- **Organizing vast amounts of data has become a requirement for cultivating ongoing relationships with alumni and friends. The implemented solution must be able to manage a diverse range of constituents defined by multiple relationships and affiliations. With this increase of data, the proposed solution must be an efficient system able to improve workflow for staff, volunteers, and the University's campuses, schools, colleges, and units.**
- **This new system will help The University of South Carolina meet new performance and accountability requirements, which will be the cornerstone of long-term fundraising success. The awarded solution implemented will support data collection and management based on the best practices of the higher education fundraising industry. In addition, the awarded solution will be able to monitor performance goals and respond to the demands of donors, state and federal agencies and industry standards with more accountability than our current system.**
- **The immediate objective of this project is to ensure that the University's Division of Development and My Carolina Alumni Association have an adequate information management system to carry out the responsibilities of annual fundraising, alumni programming, and the preparation and implementation of the next university capital fundraising campaign.**

23. What are they types of events you are looking to manage? How many events do you have in a year?

ANSWER:
More than 250 events each year. Some events require ticket purchase (multiple ticket prices for each event) while others require a simple RSVP.

Athletics; Auction; Class/Workshop; Concert/Music; Conference/Seminar; Convention/Tradeshow; Festival/Fair; First Lady Event; Food/Wine; Fundraiser/Charity; Networking/Club; Other; Party/Social/Mixer; Presidential Event;

Recognition/Award; Recreation/Outdoors; Religious/Spiritual; Reunion; Sports Event; Stewardship

24. What are the biggest risks you see or concerns you have about the success of this initiative?

ANSWER:
To be determined; risk assessment will occur after contract is awarded.

25. How many full time CRM user licenses will be needed?

ANSWER:
250.

26. How many part time users?

ANSWER:
To be determined. There is currently no differentiation in the system between part time and full-time users.

27. Is USC interested in a cloud based platform that can be used across the University?

ANSWER:
Yes, but not mandatory.

A. **Proposed Solution**

Describe in detail your proposed solution. Fully explain how your proposed solution will enable The University of South Carolina to achieve its Expected New System Advantages described in Section III of the solicitation and how it will meet/exceed the University's Expected Results listed in Section III of the solicitation. Indicate if your proposed solution will be Hosted by the University or will be Cloud based instead.

28. What is the total number of living alumni for USC?

ANSWER:
301,736.

29. Does USC have a MDM strategy? If so, please explain.

ANSWER:

No.

30. Would USC consider extending the RFP due date to late May?

ANSWER:
No.

31. Is USC interested in a marketing automation solution for Advancement? What marketing tool does USC currently have in place?

ANSWER:
Yes. USC does not have a marketing automation solution. This would be a need with a new system.