UF UNIVERSITY of FLORIDA

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April 24, 2020

ADDENDUM #1 to the University of Florida ITN21NH-100 Advancement CRM, Integrations and Partner Solutions scheduled to be opened on **May 7, 2020 3:00 PM** at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

This addendum shall be considered part of the Contract Documents for the above mentioned **ITN21NH-100** as though it had been issued at the same time and incorporated integrally therewith. Where provisions of the following supplementary data differ from those of the original document, this addendum shall govern and take precedence. All other terms, conditions, and regulations will apply.

This addendum consists of:

1. **Responses to technical questions and inquires submitted prior to 5pm, April 17, 2020.**

Sincerely,

Nicola Heredia

Nicola Heredia, Director
Procurement Services

Please acknowledge receipt of Addendum #1 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

______________________________ ______________________________
Signature Company Name

____
Email Address

______________________________ ______________________________
Company Address City/State/Zip

General Questions

Q001: As a result of the current COVID-19 quarantines being enacted across the country, our company's office locations have closed at state and local government instruction. Would the University consider waiving the hardcopy shipment and manual signature requirements? As alternatives, we would be happy to process signatures through DocuSign and submit a digital copy of our proposal via email by the submission deadline.

Answer: DocuSign signatures are acceptable. Currently we request a hardcopy of the proposal be shipped to campus, but we are continuously evaluating the current climate, so this may change. If there is a change to the submission requirements that will be communicated in the form of an addendum.

Q002: Attachment A – Intent to Respond Form – asks vendors to return the form with a signed confidentiality agreement. The RFP asks for the Confidentiality and Non-Disclosure Agreement (Attachment B) to be included in Tab 1 of the response. Please clarify how we are to provide the signed Attachment B.

Answer: We request that the Intent to Respond documentation is returned by 5pm on 4/27. The NDA can be submitted at that time, or in tab 1 of the proposal response. The latest it should be supplied is in the proposal response.

Q003: Please provide the annual gift matching revenue for UFF.

Answer: $961K (5-year average)

Q004: Please provide the number of users needed for your Advancement solution by key role, including but not limited to system administrators, executives, fundraisers, alumni relations staff, records management, gift processors, prospect researchers, report writers, business analysts, etc.

Answer: Alumni Relations (50); Business Analysts (15); Communications Staff (15); Deans, Directors (20); Donor Relations (10); Executives (15); Finance & Accounting (10); Fundraisers & Support Staff (200); Gift Processors/Records Management (25); Limited Use (Consultants) (20); Project Management (5); Prospect Researchers (15); Report Writers (15); Service Accounts (10); Sys Admins (5); Talent Management (10); Test Accounts (10)

Q005: When presenting multiple product offerings (for example, giving forms, crowdfunding, giving day) should we submit a completed workbook for each product?

Answer: Yes. One copy of tab 3 can be included, with all other required tabs for the lots being responded to

Q006: In the 'Additional Information' tab, are you looking for attachments of full proposals with a complete SOW?

Answer: The Additional Information Tab (Tab 8) should not include full proposal, but include any additional or supplemental information that would help the Selection Committee make an informed decision about your product/s.

Q007: Can you clarify what parts of the workbook(s), forms (the NDa), and proposals need to be sent by mail and which can be submitted via email?

Answer: All documents except for the Intent to Respond should be included as a hardcopy (along with electronic version) in the proposal that is sent to campus

Q008: Can we please get a co-signed NDA back to us please?

Answer:These will be provided prior to the opening date.

Q009: Would you provide technical resources for your existing stack of apps and products?

Answer: The Foundation has a Computer Services group and a Data Services group that has supported the existing application, data, and technical stack. In addition to supporting the implementation of the scope within the ITN, along with implementation partners, these teams will continue to support the existing stack.

Q010: Apart from the pain points mentioned in the RFP, do you have any other business gaps which you would like to map with the proposed solution?

Answer: Our core business areas supported by the scope of the ITN include fundraising, prospect management and research, alumni engagement, constituent communications, gift processing, records management, data integrity, and reporting and analytics. It is our expectation that the implementation of the full scope of the ITN will address our needs to modernize the internal and external user experiences and business processes associated with these core functions.

Q011: Do you have single sign on implemented as part of your existing stack? If yes, who is the vendor? Are you willing to continue with the same vendor or looking for a new solution?

Answer: No. The functionality does not exist for our current donor database. The Foundation uses Active Directory and the university uses Shibboleth.

Q012: What is the road map for the Oracle financials, are you going to sunset Oracle financials and looking for a cloud equivalent?

Answer: This is not part of the scope, as this is driven by the University.

Q013: Are you using any cloud-based tools and services?

Answer: Yes -- Microsoft Teams (UF), ADP (Advancement HR)

Q014: What existing systems you would like to continue or need replacement?

Answer: The lots within the ITN identify the core functionality that we seek to improve. Replacing the core CRM is the first priority, followed by integrations and data catalog. Once those partners are selected, we will conduct a gap analysis to determine what additional functionality is still needed and that will inform which current systems represented by the remaining lots need to be replaced.

Q015: Does UF have preferences on which cloud computing provider(s) to use?

Answer: We are vendor agnostic and committed to identifying the best solutions based on requirements and security standards (i.e. US data centers).

Q016: Can you please provide the list of attendees from Mondays call?

Answer: No, the meeting was non-mandatory, and the participant list is not yet public record

Q017: Can you explain some of the drivers to move away from Ellucian?

Answer: The Foundation seeks a solution that provides access to information and functionality that is aligned with our vision (and articulated in our requirements). We seek a system that can integrate with

3rd party functional solutions seamlessly and holistically and can help the Foundation reimagine the way it serves its donors, staff, and the Gator Nation community. The existing legacy system has reached the end of its useful life for the Foundation. Further Ellucian is transition its support resources to their new platform and the Foundation feels that it is prudent not to be among the institutions that are the last remaining institutions on an old platform.

Q018: Would you consider releasing Lots 3-8 as a separate bid process? The selection in Lots 1 and 2 will dictate a lot of the response to Lot 3-8.

Answer: The Foundation is not considering releasing Lots 3-8 as separate bids at this time. The Foundation is interested in seeing a holistic view of all CRM options and 3rd party integrated software solutions.

Q019: Is there a specific budget allocated, or a threshold, for this project?

Answer: Yes.

Q020: How will you measure the success of the engagement after its complete?

Answer: The Foundation will establish critical success factors at the beginning of any project that will be used to measure the success of the engagement. Some of these have already been defined within our business case and the up front visioning work that we have completed, and incorporated this information within on requirements. Factors such as a full scope, on-time and on-budget implementation are of primary importance.

Q021: Based on your feedback in the RFP, which direction is your team leaning towards, a custom solution and build or a pre-built solution or product?

Answer: The Foundation prefers a CRM and 3rd party solutions that require minimal customized or customized bolt-on solutions as defined on Tab 3 of Attachment C- Response Workbook.

Q022: Which framework and idp does UF use for Single Sign on?

Answer: The Foundation uses Active Directory and the university uses Shibboleth.

Q023: Can you please confirm that an email is acceptable for the intent to participate document?

Answer: The Intent to Respond document can be submitted via email

Q024: P.18 4.0 PROPOSAL RESPONSE AND PREPARATION INSTRUCTIONS. Will you modify the proposal delivery requirements to permit electronic submissions via email? This guidance is also mentioned on Page 21, in 4.1.6 Faxes or Emails Not Accepted.

Answer: DocuSign signatures are acceptable. Currently we request a hardcopy of the proposal be shipped to campus, but we are continuously evaluating the current climate, so this may change. If there is a change to the submission requirements that will be communicated in the form of an addendum.

Q025: P.19 4.1 Proposal Format Organization Part of the section reads: "using binding tabs that will facilitate the distribution and evaluation of the proposals." Can you clarify the reference to "binding tabs"? Are you suggesting that you'd prefer a large black binder clip to hold the paper together, instead of a bound proposal packet, or instead of delivery in a 3-ring notebook?

Answer: However you choose to submit the proposal is acceptable. We just ask that each tab is separated to facilitate ease of review

Q026: P. 23 4.2.10 Required Signature This section reads: "The University may reject any vendors' response if it is not signed as indicated and/or required by the areas, spaces, or forms provided within this ITN." Can you clarify and modify this section to permit signatures via DocuSign?

Answer: DocuSign signatures are acceptable. Currently we request a hardcopy of the proposal be shipped to campus, but we are continuously evaluating the current climate, so this may change. If there is a change to the submission requirements that will be communicated in the form of an addendum.

Q027: Please clarify the use of attachments in the instructions that follow. For the Excel tabs that mention attachments (Attachment 2, Attachment 3, etc.), if we have enough room to answer the question in the Excel worksheet, do we still have to provide a separate attachment? Or is the use of attachments simply optional in case we need more space?

Tab 3: Required Attachment C – Response Workbook. Response workbook includes all required information in order for the proposal to be evaluated. The attachments for each page should be submitted in such a format to allow committee review
Page 1 Company Information – incl. HECVAT (Attachment 2)
Page 2 Company Alignment - incl. Projects (Attachment 3), Integrations and Partners (Attachment 4), Company Culture (Attachment 5)
Page 3 Lot Requirements
Page 4 Implementation – inc. Project Team Resumes (Attachment 6), Implementation Approach (Attachment 7), Implementation Plan (Attachment 8), Implementation Questions (Attachment 9), Training Documentation (Attachment 10)
Page 5 Pricing – Pricing (Attachment 11)
Page 6 Company Roadmap – Roadmap (Attachment 12)
Page 7 References
Page 8 Additional Information – Any additional information (Attachment 13)

Answer: As long as all requested information is included, attachments may not be required/necessary.

Q028: In the Invitation to Negotiate For Advancement Technology Partners document, when do vendors need to complete pages 39 & 40 and return to UF?

Answer: The Certification of Proposal is to be submitted with the vendor's proposal.

Q029: Are there any material differences between the original Excel spreadsheet posted on 4/9/2020 and the updated version 4/13/2020?

Answer: Updated version has been unlocked to allow information to be added

Q030: For tab #7 "References" Provide at least three general (3) references for clients where your software has been implemented. Questions: If we wanted to include more than 3 references where would you like us to include them (separate document, modify tab 7 to add them etc.)? Also, if we provide the general references does that cover the other reference section requests (for ex. gift processing, reporting etc.). Typically, we would provide the main point person at an institution and they would work with you on pulling in the additional SME's that you wanted to connect with.

Answer: More than 3 references can be provided if necessary. They should be submitted in the clearest way possible to aid review.

Q031: Are the implementation services able to be performed all or partially remote?

Answer: The Foundation seeks implementation services that provide optimized results to desired objectives and business needs. We anticipate a blend of in-person and remote implementation services.

Q032: Should we bid only on LOT1 or can we be bid on all the LOTs?

Answer: Any combination of lots can be responded to

Q033: Should break our licensing and implementation bid cost per LOT? if so, how the requirements that are across multiple LOTs, should we factor them in both quotes?

Answer: As long as the quotation is clear, and any requirements are included, you should include the quotations in the clearest way possible

Q034: R0491 - what project management Tool are you using?

Answer: Right now, the team uses various tools to facilitate project management; however, there is not currently a comprehensive solution in place. We are actively pursuing other solutions to better facilitate project management for this implementation.

Q035: Is UoF satisfied with Marketing Cloud or looking for a replacement of this with the new solution?

Answer: We are satisfied with Salesforce Marketing Cloud. We would only be open to replacement if the CRM-preferred digital marketing solution significantly outperformed SMC with greater functionality for a significantly lower cost.

Q036: With the invoices being NET30, can you please define the payment terms for the licensing and implementation cost?

Answer: The Foundation will work with vendors on appropriate payment schedules.

Q037: What is the current size of IT team (Development & Support both) supporting the in-scope services for different Lots?

Answer: Approximately, 30 people between IT and data teams.

Q038: What is distribution of FTEs across onsite (US) and offshore (non-US)?

Answer: All Advancement staff are on-site in Florida.

Q039: What is expected completion time for each lot? Are there any schedule constraints that needs to be met?

Answer: Selecting solutions for Lots 1,2, and 7 are a priority for the Foundation. We hope to begin implementation of a new CRM in late 2020 and go live between July and September of 2022.

Q040: What is the current IT spend for the in-scope services (License, FTE, non-FTE spend)?

Answer: The Foundation will not provide this information at this time.

Q041: Are there specific preferences for technology platforms for solutions required in various lots?

Answer: The Foundation is approaching this software evaluation and selection from a vendor agnostic lens. We do not have any predetermined preferences for vendors for any of the eight Lots.

Q042: What are the current contracts for existing platforms/solutions that UF would like to continue in future as well?

Answer: As it relates to the scope of this ITN, all current solutions in lots 3-6 (see ITN for details) will be evaluated against the responses to ensure best fit. The Foundation does maintain a homegrown intranet and document management system that will need to be integrated appropriately.

Q043: What are the current initiatives that are in-progress or being planned that have linkage or impact on the scope of this RFP.

Answer: Earlier this fiscal year, the Foundation created a Data Management & Governance Framework that will serve as the foundation for decision making and implementation. Additionally, data improvement strategies have been developed are are in process, as led by the Data Integrity Implementation Team (Data Management team). We also trained 8 FTE in Business Process Improvement (BPI) methodology which informed requirements for this ITN. BPIs have also been integrated into all of our project implementations and will be central to AEN implementation.

Q044: Has UF conducted any user/stakeholder survey on the feature set needed for the solutions?

Answer: The Foundation conducted constituent experience sessions with Foundation staff to gather requirements and desired functionality for a new system. More than two-thirds of the organization has participated in these sessions over the course of the last 2 years.

Q045: We understand UF seeks a cost effective solution for the scope mentioned in the RFP. Is there a pre-defined budget for each of the lots of at aggregate level for all the lots?

Answer: See answer for Q065.

Q046: Robotic Process Automation (RPA) based solutions have proven Total Economic Impact (TEI) through Digital Transforamtion, Compliance & Audit Saving, Reduced Errors, Business Efficients, Productivity gains etc. It may address few of the existing pain points. Does Foundation has any exising RPA based solutions, or otherwise we would like to recommend options as part of our solutions

Answer: The Foundation does not currently have any RPA based solution, but we are interested in learning how vendors would leverage RPA in their proposed solutions.

Q047: Does UF has any requirement around data residency or Data Encryption for data at rest?

Answer: 256 AES; data must be stored in the US. See requirement R1069.

Q048: Is UF looking at leveraging an offshore based resources for the project or it should be considered onsite only ? Also can UF list the onsite locations for this project ?

Answer: If this relates to staff, the preference is that all teams will be located within the US.

Q049: Does UF has any restriction of using only US Citizen or Green Card holders to deliver this project?

Answer: No.

Q050: The RFP states that, "In preparation for Advancement Engine Next, the Foundation has put in place a comprehensive and cross-functional data management infrastructure to execute priority projects, improve data quality pre-conversion, and facilitate consistent documentation of business practices, data rules, and procedures. […] This internal framework facilitates escalation and will drive the implementation of Advancement Engine Next." Could you confirm that this

infrastructure includes the program governance needed to support an implementation? Or are you looking for a potential partner to help stand up a program governance and / or project management structure for the UF Foundation?

Answer: This infrastructure provides the appropriate governance infrastructure.

Q051: To what extent has UF documented current state business processes? Designed future state processes?

Answer: The Foundation has mapped current and future state processes for the most critical processes within each of the Foundation's functional areas. We continue to conduct BPI sessions and will provide maps to vendors who are awarded a contract with the Foundation. We will continue to evaluate the approach to BPIs and there may be some gaps that need to be filled in the early stages of implementation.

Q052: What additional organizational units (besides the UF Foundation) will rely on Advancement Engine Next?

Answer: AEN will serve as the primary database of record (and accompanying tools) for donor, prospect, and engagement data and efforts for the entire university. Most units on campus are impacted by and will interact with these systems in some capacity. Our primary stakeholders are 15 units with fundraising and engagement staff typically defined as colleges with alumni or areas that solicit gifts (e.g. museum, hospital, athletics, etc.)

Q053: Are business processes for Advancement centralized? Or do advancement-related business processes differ among units outside of the UF Foundation?

Answer: Primary functions are centralized within our central Advancement operation and include prospect management, gift processing, online giving, records management, reporting. Centrally, services are provided for alumni communications, digital communications, event management however, some units may leverage different unit-based resources or processes for executing these strategies.

Q054: Is the current Ellucian Advance application supported by UF Advancement or UF IT?

Answer: The Foundation supports the current Ellucian Advance application.

Q055: What payment processor(s) are used in the organization today and are you open to other payment processor(s)?

Answer: We currently use the native A/P module in PeopleSoft. We might be open to other payment processors

Q056: Most of the current Advancement ETL, warehouse and visualization tools are proprietary to the database currently in use. Is the expectation that those tools should also be proposed in a way that supports the requirements? Or could tools currently in use across the broader university be utilized?

Answer: It doesn't matter as long as we meet the requirements.

Q057: What is the expected IT support structure for Advancement? Is it currently an Advancement-specific team or is Advancement supported in a more central IT structure?

Answer: The Foundation has a team that supports its information technology needs.

Q058: I also think that to scope out pricing / implementation time, we’ll want to understand if they’re expecting all requirements to be addressed, or if we can phase the implementation of

requirements. Will leave it to ES&A as the experts here, but I think we'd want to ask a question about an implementation partner's leeway to make the implementation of requirements less overwhelming.

Answer: N/A

Q059: Is it the university's expectation that all requirements will be met at the initial go-live? Could the requirements be spread across multiple phases?

Answer: Mission critical functionality will be prioritized (e.g. gift processing, prospect management, core CRM functionality). Generally, assume that 80%+ of functionality should be met at go-live.

Q060: What is the fiscal year for the University of Florida? Is budget approved and in place for the purchase and implementation of a new system in the current fiscal year?

Answer: Funds are available for this purchase

Q061: What are the top goals driving the project from UF Foundation leadership?

Answer: Advancement's mission is to be a catalyst for advancing university priorities through private support. Our annual goals include various fundraising performance metrics, alumni participation, endowment growth and ROI. We envision this project helping the organization reach its goals by improving the overall user experience.

Q062: How will they be used to guide the project and how will you measure progress of these goals?

Answer: The Data Management Steering Committee will serve as the primary entity to establish critical success factors and key milestones of the project and will measure progress against these factors. We will continue to evaluate these goals and success factors through status updates throughout the project.

Q063: Will you be making purchases off their own MSA or the university's?

Answer: As a foundation contract we won't be able to leverage any master service agreements that the university holds. Similarly, we cannot leverage collective bargaining agreements.

Q064: Given many of us live in states where "shelter-in-place" is in effect due to Covid-19. Many print shops are not open and it may be illegal to leave one's home. On the kick-off call it was mentioned that digital submission is being considered. Can you please provide as much detail around this accommodation given the global health crisis?

Answer: DocuSign signatures are acceptable. Currently we request a hardcopy of the proposal be shipped to campus, but we are continuously evaluating the current climate, so this may change. If there is a change to the submission requirements that will be communicated in the form of an addendum.

Q065: Given the current health crisis, will there be accommodations made around the stated need for a wet signature? There are many signatories that are inaccessible.

Answer: DocuSign signatures are acceptable. Currently we request a hardcopy of the proposal be shipped to campus, but we are continuously evaluating the current climate, so this may change. If there is a change to the submission requirements that will be communicated in the form of an addendum.

Q066: What is your Master Data Management strategy?

Answer: Data services teams will be able to generate and view a core set of identities with a uniquely generated Global Unique ID - GUID against which all other systems are integrated. Ideally this would be outside of the CRM. It would be separate from UF main campus MDM.

Q067: Will an NDA be required if there is an existing MSA with the University of Florida?

Answer: Yes, the NDA will be required for this project

Q068: Is it possible to provide a breakdown of users by roles:
a. Frontline Development Officers: 120 Development Officers
b. Operations (describe what roles are counted here):
c. Business Analysts:
d. Technical Administrators:
e. Other:

Answer: Alumni Relations (50); Business Analysts (15); Communications Staff (15); Deans, Directors (20); Donor Relations (10); Executives (15); Finance & Accounting (10); Fundraisers & Support Staff (200); Gift Processors/Records Management (25); Limited Use (Consultants) (20); Project Management (5); Prospect Researchers (15); Report Writers (15); Service Accounts (10); Sys Admins (5); Talent Management (10); Test Accounts (10)

Q069: Regarding Terms and Conditions, please describe an acceptable process for reviewing and incorporating Vendor's Terms and Conditions for Software Services Usage and Intellectual Property rights.

Answer: If you have additional terms that you would like included please identify those according to the worksheet. If you request modifications to the UF terms and conditions you should include a redline version on the ITN terms. Adherence to UF terms and conditions is one of the evaluation criteria.

Q070: Will we receive a list of those that attended the pre-bid?

Answer: No, the meeting was non-mandatory, and the participant list is not yet public record

Q071: Will we receive a list of those that submit an intent to bid?

Answer: No, the meeting was non-mandatory, and the participant list is not yet public record

Lot 1 Questions

Q072: Please provide the number of users who manage and configure client-based configuration elements and to manage all extract, transform, load (ETL) or data loading jobs and processes. In addition, please provide the number of people who are viewers

Answer: 35 of the former; 415 of the latter

Q073: Do you intend to implement Sales Automation, Service – Incident Management System? Are you planning to remove your existing system or going to continue with the old system along with the new system?

Answer: We would prefer for teams such as data, gifts and records, and prospect management to have incident response built into the CRM since all of the requests pertain to data housed in the system.

Q074: What is is your roadmap for IBM Cognos?

Answer: We are currently using 10.2.2 for Advancement. Plans to upgrade to 11 or to replace Cognos will depend on chosen CRM solution

Q075: Are you expecting any integration of IBM Cognos with the proposed solution?

Answer: Integration with Cognos or alternate solution is preferred.

Q076: Do you have any existing softphone and who is the vendor?

Answer: Yes we do, and the vendor is Avaya.

Q077: Are you looking for any softphone / Chat engine / integration as part of CRM service incident management?

Answer: We currently use Skype and TEAMS in addition to Avaya. We will not need new vendors per se; we will need an integrated chat and softphone function whether that's native or a third-party integration with current solutions.

Q078: What is the roadmap for your document management system?

Answer: We use an internally developed DMS that is integrated with a multitude of internally developed intranet applications and our current donor database. This DMS will be integrated into the future donor database implementation.

Q079: How would you like to have your contact records? Are you willing to have it in the same Oracle on premise database or are you willing to migrate all the contact records to cloud?

Answer: We are open to either on-premise or cloud solutions; however, keeping our current system in place for a partial solution is not an option.

Q080: In case, if we migrate the data from the existing system to a new system, do we need to migrate only Master Data (Alumni, Parents, Organizations and Donors) or do we need to migrate the transactional data as well?

Answer: Any CRM solution would need to house MDM and transactional data; we are not going to keep our current system to process transactions.

Q081: What is your roadmap for gift management solution?

Answer: Florida's roadmap for gift management prioritizes effective business processes and efficient workflows that will facilitate work, support reporting, and provide data tracking and entry mechanisms that align with industry best practices. This includes agilely meeting the donor and entry needs of both high-volume transactions (i.e., direct mail appeals, online giving) and high-touch transactions (i.e., pledges, planned gifts, etc.). It will be important for any gift management solution to grow with the institution. This includes both in-tool and in-batch auditing capabilities that support standardized entry of required biographic and revenue data. This also includes the future implementation of API-based transfers of gift and constituent data between the CRM solution and other technologies on campus and used by partners (i.e., lockbox).

Q082: Can you provide us with the user split for each module which are currently in place?

Answer: We don't have modules, so we aren't sure what you mean by this question; however, we do have a breakdown of user counts that might be helpful. Alumni Relations (50); Business Analysts (15); Communications Staff (15); Deans, Directors (20); Donor Relations (10); Executives (15); Finance & Accounting (10); Fundraisers & Support Staff (200); Gift Processors/Records Management (25); Limited Use (Consultants) (20); Project Management (5); Prospect Researchers (15); Report Writers (15); Service Accounts (10); Sys Admins (5); Talent Management (10); Test Accounts (10)

Q083: To what extent, if any, should the CRM platform interconnect with other CRM platforms within the UF system (e.g., student, alumni, etc.)

Answer: We need to be able to share some data across platforms, but with strict security protocols to separate confidential Foundation records from access by campus entities.

Q084: Any opportunity to involve UF student curricula with the design, implementation, and/or ongoing operations of the solution?

Answer: The Foundation has not planned to involve student curricula in this process, but we are open to hearing how your solution would incorporate this approach in your response.

Q085: Will the selection of the CRM System be decided by other CRMs used, or currently deployed, by UF?

Answer: We will select the solution that best meets the needs of the Foundation, the University, and its constituents.

Q086: Are you willing to build on what CRM you currently have deployed instead of starting net new?

Answer: No, the Foundation be fully replacing the existing legacy system.

Q087: What is the total number of University of Florida's Living Alumni?

Answer: 461K, including undergraduate and graduate alumni

Q088: What is the number of active Alumni at the University of Florida?

Answer: We are not sure what you mean by active and how that differs from living alumni.

Q089: Was there a compelling event, or a specific tipping point, to consider a new solution for your Advancement team?

Answer: Several factors. First we are on an aging system today. Second, there is a lack of integrated systems and databases with the legacy system, leading to data silos. This inhibits the Foundation's ability to communicate effectively with prospects and provide leadership and staff with information that drives timely decision making.

Q090: Would your team be open to starting phase I as a discovery project (no configuration or build) to more thoroughly capture scope, needs, requirements and outcomes?

Answer: We expect that part of the scope of the implementation would involve design and discovery sessions that would augment the work already done by the Foundation to capture the scope and requirements. The Foundation continues to conduct Business Process Improvement sessions with key stakeholders and define the future state. Our goal is to move into configuration and build as soon as possible. Therefore, it is prudent for potential vendors to review the work that has been performed to understand how it can serve as an input to your desired discovery work.

Q091: How does the department and/or institution finalize a decision on a project like this? Who are the primary stakeholders involved in this decision outside of procurement?

Answer: The University of Florida Foundation Advancement Engine Next Selection Committee will make the final selection of a new CRM solution and related 3rd party solutions. The selection committee will take a holistic approach to the selection using the evaluation criteria outlined in section 2.1 of the ITN. Further, the entire Advancement community will be asked to participate in the vendor demos and provide feedback that will be taken into account by the selection committee.

Q092: What are your top priorities when making this decision and/or selecting an implementation partner? For example, would the partners' ability to drive success supersede cost in terms of prioritization?

Answer: Cost will always be an important factor in the decision making process; however, our primary goal is to identify the right set of solutions and partners to realize our vision for AEN.

Q093: What is the giving threshold for major gifts?

Answer: $100,000 commitment

Q094: How many prospects/donors does each major gift officer (MGO) have in their portfolio? How large is the staff for your Gifts team?

Answer: Portfolio size varies based on MGO level but averages around 50 qualified prospects and an additional 50-70 pool to qualify. There are between 110-120 major gift officers.

Q095: How are major giving prospects engaged typically (in person meetings, email newsletters, one-on-one emails, etc.?)

Answer: Advancement staff deploy various strategies for engaging prospects. Leading indicators for fundraising success focus primarily on in-person (or virtual) visits that strategically move conversations through the cultivation and solicitation cycle. All contacts between development officers and prospects are tracked in the system and provide valuable context and trends regarding development officer activity.

Q096: How involved in the gift processing process are major gifts staff?

Answer: Development officers submit gifts and documentation along with information such as the fund and fund purpose and associated proposal tracking information. Once information is submitted gift officers have little to no involvement in the processing of the gift unless there is a question.

Q097: Do major gifts typically get paid in a single installment? Multiple installments?

Answer: Major gifts are usually set up as pledges with payments over a five-year period. Schedules range from one annual payment to quarterly, monthly or even customized schedules within that window. Additionally, approximately 1/3 of annual total commitments are planned gifts, requiring additional flexibility in booking gifts/pledges.

Q098: Do major donors have third-party payoffs (i.e. family foundation, trust, etc.?) If so, how is the family foundation credited for the gift (hard/soft credit?)

Answer: Yes -- the foundation will receive the legal credit for the gift and other associated donors receive soft credit. This is particularly important when connecting pledge payments from one entity to pledges made by another entity.

Q099: Are you tracking households today? Are spouses automatically given soft credit for all gifts?

Answer: Yes, households are tracked. The default for credit does credit all gifts from the household to each spouse. We require the flexibility to maintain exceptions to that rule.

Q100: How are the major gifts team tracked? # of major gifts created? Solicited? Paid, etc.?

Answer: Core KPIs for the development teams include visits, proposals, and commitments. Additional metrics include pledge fulfillment, cash/pledge/deferred, qualifications, giving by band (major gift, leadership gift, principal gift), overall contacts

Q101: What KPIs are important for the major gifts team?

Answer: Core KPIs for the development teams include visits, proposals, and commitments. Additional metrics include pledge fulfillment, cash/pledge/deferred, qualifications, giving by band (major gift, leadership gift, principal gift), overall contacts

Q102: What are the various giving levels/clubs that your staff track? Can donors be a part of multiple giving levels/clubs at once?

Answer: Donors can be part of multiple societies. Centrally managed societies include the Legacy Society (Gift Planning), President's Circle (cumulative giving of $1M+), and a Loyalty Society (complex consecutive giving criteria). Additionally, colleges and units may manage gift clubs that assign membership based on any number of criteria including gift amount, designation, years since graduation, etc. These would all need to be tracked in the system with membership automatically assigned based on the pre-set criteria.

Q103: Are there different giving levels/clubs for annual giving vs. major giving vs. planned giving, for instance?

Answer: Yes. All of the above.

Q104: How are annual gifts typically solicited? Do larger annual gifts go through similar processes as major gifts?

Answer: Annual gifts are solicited via phone, direct mail, email, text message and social media. The major gift process is not typically used to solicit annual gifts, but occasionally a development officer will close a larger annual gift in conversation with a prospect. We typically get a good amount of larger annual gifts through the standard direct marketing channels, especially direct mail.

Q105: How many Annual Giving staff are there?

Answer: There are seven annual giving staff members.

Q106: What type of segmentation does the annual giving team do? Is it done in house or by an external vendor?

Answer: All segmentation is completed in-house for annual giving appeals. Typically we segment by preferred unit of graduation, giving history or major or department.

Q107: What format do appeals go out in? Email? Mail? If mail, do you work with a mail house/caging vendor?

Answer: Appeals go out via phone, direct mail, email, text message and social media. We work with a mail house for the majority of our mailings, but we also have an in-house mail suite for smaller projects.

Q108: How is the annual giving team's success tracked? What other KPIs are important for the annual giving team?

Answer: The primary KPIs used to track annual giving success are overall revenue, overall donors, leadership annual giving revenue (gifts between $1k and $10k), leadership annual giving donors (gifts between $1k and $10k), donor retention, and undergraduate alumni donors. We have monthly and annual dashboards that track these KPIs overall and by each college and unit. We also track progress on each direct marketing project by quarter.

Q109: Are gifts entered in batch or one by one?

Answer: Both, depending on the type of gifts; however, the majority of gifts are entered by batch.

Q110: How do gift records get pushed to the Finance Office?

Answer: Gifts are pushed via a nightly transfer, if appropriate, to the financial accounting system; however, not all gifts are transferred. This transfer is supported by several reconciliation reports – both manually produced as well as system-generated.

Q111: Row 61: Enter text messages as a contact report in the system.
Is the requirement to classify personal, one to one text messages from DO's? Or are they talking about automated text messages?

Answer: This requirement is referring to one-to-one text messages between a DO and a donor or prospect.

Q112: Row 200: Record the topics and content of text messages from alumni and donors on the entity record.
Is the requirement to classify personal, one to one text messages from DO's? Or are they talking about automated text messages?

Answer: This requirement is referring to one-to-one text messages between a DO and alumni and/or donor.

Q113: Will you key or scan directly into the new database or use an outside Cager? If outsourced, which one do you use?

Answer: The solution should be agile enough to meet all approaches – direct data entry by the Gifts team, scanning of barcodes by the Gifts team to populate gift data, and data entry and/or data transfers from an external vendor. Currently, outsourced gifts are managed via a bank lockbox.

Q114: How many direct mail house mailings per year?

Answer: We send 20-30 direct mailings per year.

Q115: How many direct mail acquisition mailings per year?

Answer: We do not typically use direct mail for acquisition purposes as our ROI isn't very good. We plan to send 5-10 mail pieces that will involve acquisition audiences in the upcoming year.

Q116: Any other mailings like Planned Giving, etc?

Answer: The gift planning team has a robust direct marketing strategy. Additionally, teams such as donor relations, communications, alumni relations and the college and units deploy direct marketing communications beyond the scope of the central annual giving program.

Q117: How many phone numbers do you have?

Answer: 1.2M (includes all active phone numbers on any record) from 873K entities.

Q118: Do you do any outbound telemarketing? If yes, is it in-house or outsourced?

Answer: The central annual giving team oversees the phonathon program, the day-to-day management of which is sourced to RuffaloNoelLevitz (RNL) and they are embedded in the UF team. The phonathon is physically located on our campus.

Q119: Do you have inbound call center services that are linked to the database?

Answer: No.

Q120: R307 - Integrate financial and fundraising reports from PeopleSoft and the CRM. Can you explain this requirement more fully?

Answer: Peoplesoft is the source of record for spending and current money available in funds, while Advance records what money has been historically raised for a fund. Currently, reporting both sides of that equation is a manual process for our Donor Relations team who must report to donors on fund utilization in their endowment reports.

Q121: R804 - Integrate the sunsetting process into the proposal tracking process. What do you mean by sunsetting process?

Answer: Sunsetting refers to a set of business rules that are applied to our manager assignments and proposal records. In both cases, determining factors for either removing an assignment or closing a proposal record are based on activity entered by development officer (i.e. contact report, task, strategy) within a specified window of time.

Q122: R965 - Set a sunsetting timeline automatically within the PSR workflow. Please explain what PSR workflow is.

Answer: Future State process maps will be provided to the selected CRM vendor that describe the PSR workflow. This requirement articulates the ability to set timelines within the CRM that allow a prospect to be "sun-setted", or removed from a portfolio, after a certain period of time.

Q123: R0791 - Determine the method of preferred notification for correspondence relating to the data request/ticket. Question: What does data request/ticket refer to here please?

Answer: Examples include an ad-hoc data request or analytics projects for our data teams, an update to an entity's record for our records management team, updates to prospect/proposal information or requests for prospect research for our prospect management team. The requestor would be able to indicate their preference for being notified of the fulfilled request (or for any communication regarding the request), including both in-system notification or email.

Q124: As you already have Salesforce instance/licenses, can the proposed solution be its own Salesforce instance, or should it sit on the same Salesforce org?

Answer: Any core CRM platform will need to be integrated into our current stack.

Q125: What are the current Salesforce licenses in place today? (Ex: addition of Sales Cloud licensing, Service Cloud licensing, etc.)

Answer: The Foundation currently has a Salesforce instance for Marketing Cloud.

Q126: With 400 user licenses required, on average:
How many staff need membership, events and donation processing functionality access?
How many staff need business development (opportunity management) functionality access?
How many staff need Case management (manage request tickets) functionality access (R0774 – R0789)?

Answer: Respectively: 25, 250, 75-100

Q127: Is there an existing System Integrator currently assisting the organization on Salesforce? If yes, how much work has been done in-house versus with the current System Integrator?

Answer: None

Q128: Can the software licensing and implementation services be provided by separate vendors as a co-bid?

Answer: If a separate PO would be required for the license and service, each vendor should respond separately, but indicate in the documentation the partnerships. If one PO to one vendor partner was acceptable, then that partner should be the one to respond.

Q129: Do you have a preferred SMS/iMessage vendor?

Answer: No preferred vendor, but preference that the vendor can integrate with Salesforce Marketing Cloud

Q130: Is UoF satisfied with GiveGab? Would UoF consider replacing GiveGab if the new CRM provided integrated online giving functionality? What is the annual cost of GiveGab?

Answer: Yes, we would consider another online giving solution if it offered the necessary functionality and better integration with the CRM.

Q131: Is UoF satisfied with CVENT? Would UoF consider replacing CVENT if the new CRM provided native event registration and management? What is the annual cost of CVENT?

Answer: We would be open to another event registration and management solution if it offered equal or greater functionality AND greater integration with the CRM product. We are on an annual contract, but due to lead time on events, migration to any new solution would take a minimum of two years.

Q132: R0385 – What functionality do the volunteers logging in to the system need? What tasks will they be performing and what data will they access?

Answer: Depending on the volunteer level, they may simply be accessing their own volunteer activity, or they may need to see the activity of all members within a defined area or membership set. They may need to establish plans, budgets to support those plans, log engagement activities, communicate with defined membership sets. They may need to leverage email addresses for the membership set, but not necessarily have direct access to that data (able to view/download it).

Q133: It is assumed that all the existing data needs to be migrated to the new solution. Please confirm.

Answer: About 95% will need to be migrated.

Q134: Please share information on amount of data to be migrated into the new CRM system, including (donor records, prospects, documents, etc.)?

Answer: 1.3M entities and 6M gift transaction records and all associated demographic data and associated relationship data.

Q135: Is UF expecting increase in the transactions, users as against the existing values? If Yes, what is the expected yearly rate of increase?

Answer: As a function of our business, we expect an increase in gift and pledge transactions (~7K per year). With new functionality we also anticipate an increase in the types of activity tracked within the system (e.g. events, contacts, affiliations, etc.). The number of users may increase; however, I see this as less of a factor.

Q136: We understand the current physical infrastructure of Advance is maintained internally and on-premises by the Advancement IT team. We assume there are no specific constraints to be on-premises, and you are open for cloud based solutions. Please confirm

Answer: Yes.

Q137: We are assuming you are open for both Custom and/or SaaS based solutions for Advancement Engine Next initiative. Please confirm

Answer: Yes

Q138: Is your current implementation at one central location in US, or is distributed across multiple geographies within/outside the US.

Answer: Current implementation resides in the US at one primary location with backups geographically dispersed within the US.

Q139: Please indicate a various roles for the application along with a tentative user count?

Answer: Alumni Relations (50); Business Analysts (15); Communications Staff (15); Deans, Directors (20); Donor Relations (10); Executives (15); Finance & Accounting (10); Fundraisers & Support Staff (200); Gift Processors/Records Management (25); Limited Use (Consultants) (20); Project Management (5); Prospect Researchers (15); Report Writers (15); Service Accounts (10); Sys Admins (5); Talent Management (10); Test Accounts (10)

Q140: Is there a requirement for using multiple currencies or multiple languages?

Answer: Not at this time

Q141: Does UF envision any functionality to store documents into an external system? If yes please share the details of those systems?

Answer: We have a homegrown document management system (and the expectation is that new solutions would be able to integrate with this platform.

Q142: Does UF envision any functionality to e-sign documents?

Answer: Yes, see R0906. There is a desire for e-signature functionality.

Q143: Are there any strategic initiatives around annual giving/online giving initiatives that could be shared to more specifically inform the requirements around the online giving lot?

Answer: For online giving, we are looking to remove as many barriers to giving as possible, while continuing to collect the data we need for our business purposes. This could include abilities such as designating multiple funds per transaction, mobile wallet, login for saved contact information, saved payment information, etc.

Q144: In your count of 400 plus users, do you plan on having non-staff users (e.g. volunteer access)?

Answer: Our 400 user count does not include volunteers, but we hope to provide system access to non-staff users in the future, including volunteers, Gator Club leadership, etc.

Q145: Are users expected to run reports and to what level of reporting do they perform? Break out by user groups – Support teams to Executive Staff. How many staff write reports?

Answer: All users (400-450) should be able to run reports and configure which reports/charts appear on dashboards & create simple look-ups; Of those, we anticipate that there will be 35 or so power users that can create/write more complex queries, reports, charts, & dashboards.

Q146: Describe your training program. Do you have dedicated staff developing and providing training? What kind of training (just in time, helpdesk, formal class room training)?

Answer: We have a Talent Management team that is tasked with training broadly speaking. Within the data teams, there are limited training resources currently; however, we have incorporated additional staff for training into the implementation plan.

Q147: R0531 – Please provide example of handwriting to text or dictation translation use case.

Answer: A gift officer is on a visit and can dictate the call report directly into the system.

Q148: R0942 – Need use case example "Allow for ad-hoc and en masse redaction of portions of document images, as defined by UFF business requirements.".

Answer: The Foundation sometimes needs to redact portions of imaged documents. It wishes to define a region of a document and redact the information in the same physical location of the document. It may have to do this on hundreds or thousands of documents.

Q149: How many users would need access to the CRM and the other systems. Of that, how many are considered gift officers?

Answer: 400-450; about 200 who are gift officers or their support staff that enter data on their behalf

Q150: Current data allotment by tables & rows?

Answer: We have hundreds of tables to track 1.3M entities and their 6M+ gifts and pledges

Q151: How many new Entity records (ex: new Alumni records, new Friend records, new Organization records, etc) are estimated to be added on a yearly basis?

Answer: Friends - 11,500, Parents - 11,000, Students - 22,000, Corporations/Orgs - 1,000

Q152: How many new gift/pledge records are estimated to be added on an annual basis?

Answer: 225K

Q153: What is the anticipated number of automated reports to be generated on a yearly basis (example: Lot Requirements - R0165)?

Answer: This is difficult to answer without having a conversation about context. We anticipate that there would be 100-150 different reports, but those might need to be filtered further and generated for each unit (25) on a regular basis (weekly, monthly, and/or quarterly).

Q154: When implemented, what is the anticipated level of usage (as measured by log-ins) for the services described in Lot 3: Communities and Portals?

Answer: Since we do not have this functionality currently, we're estimating about 1500-2000 logins per month.

Q155: Is it possible to provide examples for Gamification requirements?

Answer: Badges/points/rewards generated against individual performance goals and/or based on average population performance. These can be generated for different teams based on their goals (i.e., fundraising, data entry, training achievements, etc.)

Lot 1 or 2

Q156: R0586 – Need more detail "Use integrated autofilled contact reports that draw information from emails with prospects."

Answer: UFF wants the ability to have a contact report autofill with information that can be found in an email with a prospect (e.g. areas of interest, gift amount, next steps)

Q157: R0685 – Need use case examples "Contain and utilize workflow features such as looping, if-then-else, and passing variables.".

Answer: Appendix 2f shows an example of a flow where certain actions occur based on what information is provided -- free membership, no life annual follows one flow, a gift follows another flow. The Foundation wants an integration environment that allows for some programmatic workflow to handle these situations.

Lot 1 or 7

Q158: Any specific desires for AI or machine learning in the solution?

Answer: Ability to predict optimal segments and timing for asks.

Lot 1 or 3

Q159: Does UF has any requirement of developing Custom Branded User interface?

Answer: Yes. For the donor portal, we would definitely want a customized, branded look that aligns with the brand and can change as the brand matures or changes. For core CRM, some interface customizations including some colors and logos.

Q160: Does UF has any requirement of enabling mobile interface? If yes then does UF is looking to for custom branded user interface solution?

Answer: Yes, a mobile interface for both CRM and donor portal are a must. They must also be customized around the same level as the desktop/app version.

Lot 2 Questions

Q161: Could you please help us in understanding the integration touchpoints i.e., existing solutions to proposed solution & existing Financials system to proposed financials solution, & existing Campus solutions to customer engagements business objects?

Answer: The Foundation desires to have an integration platform that is extensible enough to accomodate any number of integrations between solutions. Appendix 2 provides some typical integration use cases. Important future use cases include integration between the new core CRM and a new community portal, online giving environment, event management system, digital marketing solution, and data repositories (whether it be a conformed data warehouse, data lake, operational data store, or data mart. There is also a strong desire to integrate siloed data environments so that a consistent semantic layer can be leveraged (perhaps through virtualization) allowing for back end systems to be swapped without the need to alter all of the dependent reports and data streams. Appendix 1 shows the current state application architecture and integration of applications apart from the new solutions sought under this ITN will be needed. For example, under the Finance, Accounting, and Legal heading you will find PeopleSoft Financials as the accounting, assets, expense, and financial reporting solution. Data from that application may need to be integrated with the new core CRM, a data repository (warehouse or operational data store), or with the in-house produced AdvancementHUB. Integration with data contained in the campus' data warehouse (UF) is also a key use case. This data may be integrated with the core CRM or with Foundation data repositories.

Q162: Would you provide API and Webservices for those systems which require integration?

Answer: The Foundation would like to have an integration environment that keeps the amount of coding to a minimum. An integration environment that already has pre-built connectors to commonly used Foundation data sources is preferable. However, the Foundation does want the flexibility to easily create custom connectors to data sources that might not have pre-built connectors -- that could be through the consumption of a Web service or API. The Foundation also wants the ability to reuse as many integration objects as possible, to reduce the overall integration overhead. UFF also would like an integration environment that allows easy consumption of its own data through Web services or API (perhaps as simple as a checkbox to expose an API or Web service).

Q163: Does the existing system integrations support REST API and WSDL?

Answer: Some applications in the UFF stack may support REST API and WSDL. However, several of the current integrations have been accomplished through custom point to point integration created by scripts and stored procedures. See Appendix 2 for examples of integration use cases and the current integration process.

Q164: Can you please provide us the required integrations with Give Gab Enterprise and other systems?

Answer: The Foundation seeks an integration between Give Gab and the core CRM, including both transactional and biographical data. Give Gab data should also feed into Salesforce Marketing Cloud for potential marketing journeys and possibly receipting. Data from Give Gab may also be placed into other data repositories, such as a warehouse or operational data store.

Q165: Provide names of the tools and websites for which you are expecting integrations.

Answer: The Foundation desires to have an integration platform that is extensible enough to accomodate any number of integrations between solutions. Appendix 1 provides a listing of solutions and tools currently in use by the Foundation. Important future use cases include integration between the new core CRM and a new community portal, online giving environment, event management system, digital marketing solution, and data repositories (whether it be a conformed data warehouse, data lake, operational data store, or data mart.

Q166: The Foundation's primary online giving platform is Give Gab Enterprise. The Foundation has been using this platform for 3 years and will continue for at least 2 more years with a redesign soon to improve the donor experience – What are the university plans on online payment system in near future?

Answer: Either deeper integration of the GGE platform with the central CRM or potential replacement based on capabilities offered by the CRM vendor or their preferred partners.

Q167: Do you have any middleware in place towards integrating multiple applications, if yes, what is the middleware currently in place?

Answer: We do not have current middleware tools (please see Lot 2 requirements)

Q168: Do you have any SMS solution as part of marketing automation/ Engaging with students? If yes, who is the vendor? If not, are you looking for SMS solution?

Answer: We do not currently have SMS as part of any marketing automation. We may be looking for an SMS solution in the future, but there is no active search at the moment.

Q169: How involved are your IT resources in your day-to-day operations? Does your Advancement team have technical resources on staff?

Answer: The Foundation has technical resources on multiple teams that support the day-to-day operations covering the application, data, and technical stacks.

Q170: Row 540: Integrate all social media platforms with an email marketing tool. Can they list social media platforms that need to be integrated? Can they provide specs or use cases on what is meant by integrate?

Answer: We would want to be able to capture and leverage data from the major players in the space right now, such as Facebook, Twitter, Instagram, and LinkedIn. Ideally, we would like to integrate social as part of digital marketing journeys and capture social identities, email addresses, interests, and other known information as part of the constituent's CRM record.

Q171: Row 549: Execute tasks based on triggers such as receipt of email.
Personal emails or programmatic emails? If programmatic, please share examples of tasks that need to be executed.

Answer: The emails could be triggered from an automated system email or an email from a vendor who sends a specific email saying that it is ready for a data set to be sent to it or ready for a data set to be downloaded from it.

Q172: Is there a pre-defined choice of middleware platform for integration, based upon UF corporate/enterprise guidelines?

Answer: We are vendor agnostic and will select the best product based on requirements as laid out in Lot 2.

Q173: If integration solution has to support the existing environment as well, does this mean that there will be integration twice - first with existing environment and later with a new solution? Please confirm.

Answer: There are some cases where an interim integration may need to take place. The Foundation wishes that the integration solution be flexible enough to handle any situation.

Q174: Is there any sensitive data involved in integration, which requires encryption or masking at data movement and data rest?
If yes, please eloborate

Answer: The Foundation does have data that needs encryption during movement and at rest. There may also be future use cases for masking data as better solutions will provide for expanded use of data. Please note that donor records are confidential to the greater UF community and are exempt from public records law.

Q175: For avoiding Vendor lockin : Are there any prefered open source technologies or open for suggestions

Answer: The Foundation is open to any solutions.

Q176: What will be volume of data we will be dealing in integration in an hour

Answer: As much as 150-250 GB.

Q177: R0018 - Please define dashboard

Answer: The Foundation would like to be able to use an integration platform to supply data for dashboards in other solutions such as in the core CRM. That way team members only have to look in one location for all relevant information.

Q178: R0187 - Please provide more detail around "completion status from external process".

Answer: The Foundation would like the ability to generate a completion status message from an integration platform that can be consumed into another solution, such as the core CRM. This will allow them to use a dashboard to understand if all of the data was transferred successfully.

Q179: R0578 - Need to understand what you mean by "Auto-pull"?

Answer: The Foundation wants the ability to automatically identify missing information in a record and execute a transaction to populate the missing data from the appropriate repository (such as a master data repository). For example, let's say that an employee contributes to a fund. The contribution comes across without the employee's campus address. The process would identify that it is an employee and execute a pull of information from the Human Resources system of record to complete the address information.

Q180: R0632 - What 'logic' ? Who's "master data management"?

Answer: The Foundation wants the ability to embed logic into an integration. The master data referred to in the requirement is the Foundation's master data environment (in whatever form that might take).

Q181: R0668 - which mobile applications?

Answer: Mobile applications associated with any of the application stack listed in Appendix 1. The Foundation also has some mobile applications built on the Essenza platform.

Q182: R1025 - Is there a list of Univ apps and data stacks?

Answer: Applications utilized by the Foundation are found in Appendix 1.

Q183: R1028 - Please define "Directly move"?

Answer: The Foundation wants the ability in some circumstances to integrate data directly between two solutions without involving an intermediate solution or environment (beyond the integration environment).

Q184: R1029 - Please define "Directly move"?

Answer: The Foundation wants the ability in some circumstances to integrate data directly between two solutions without involving an intermediate solution or environment (beyond the integration environment).

Q185: R1030 - Please define "Directly move"?

Answer: The Foundation wants the ability in some circumstances to integrate data directly between two solutions without involving an intermediate solution or environment (beyond the integration environment).

Q186: R3033 - Please list proprietary vendor data products.

Answer: The Foundation engages vendors for particular data services such as data cleansing and wealth screening.

Q187: R1034 - Please define change data capture? i.e. log mining?

Answer: Change data capture is the ability to see where data was changed in a database or repository and replicate that change automatically to another data store. For example, this could be used to fuel a data hub transaction to update a master data environment which in turn updates several client systems -- such as a change of address.

Q188: R1036 - What does "Function as a component within an overall logical data warehouse strategy." mean?

Answer: The Foundation is taking a logical data warehouse approach -- meaning that not everything will be contained in a conformed warehouse but, from the user experience it will appear to be a seamless repository. This might be accomplished through a virtualization approach or through other technology. The integration platform should be able to support the logical data warehouse approach.

Q189: R1040 - Should this be in Lot 7?

Answer: This requirement is about the integration platform supporting the architecture, not performing the functionality in Lot 7.

Q190: R1041 - Should this be in Lot 7?

Answer: This requirement is about the integration platform supporting the architecture, not performing the functionality in Lot 7.

Q191: R1042 - Please describe your data hub use case and requirements.

Answer: The data hub is an architecture that centralizes the data flow among several systems that share data. It connects several producers of data (applications, feeds, etc.) with several consumers of data (applications, processes, data environments). The idea is to have as few integrations as possible while efficiently sharing authoritative data throughout all of the Foundation's systems.

Q192: R1043 - Should this be in Lot 7?

Answer: This requirement is about the integration platform supporting the architecture, not performing the functionality in Lot 7.

Q193: What does a hairball integration strategy entail? Generally, point to point integrations have downstream implications, are you looking at an architecture based on scalability and reusability?

Answer: A hairball integration strategy is one where there is a messy mixture of point-to-point integrations that may be integrating the same data time and time again. The future strategy is to leverage an integration platform that is extensible, scalable, and allows the frequent reuse of data.

Q194: For integration, are you looking for an application-agnostic platform or platforms built for the individual applications?

Answer: The Foundation prefers an application-agnostic platform.

Q195: How are you viewing the Value of an integration strategy? I.E. What impact does integration have on the long-term success of the Advancement Engine Next initiative?

Answer: An often overlooked key to a successful data architecture is an integration platform that is easily maintainable, scalable, and promotes the optimal use of authoritative data. A number of university foundations have been limited because of their inability to leverage a sound integration environment.

Q196: What is the mix of real-time and batch integrations?

Answer: The current Foundation environment contains mostly batch integrations. However, in the future the Foundation wishes to have timely information that will shift to more real-time integrations.

Q197: How are integrations currently built and managed?

Answer: Integrations are currently done through scripting, database queries and stored procedures, and movement of data through Excel exports and FTP processes. Examples of current integration use cases may be found in Appendix 2.

Q198: Will you be exposing APIs externally or need to secure your APIs?

Answer: The Foundation may have use cases for exposing APIs -- especially as part of a data hub strategy or as feeds to external vendors. These external APIs may need to be secured based upon Foundation data policy or classification.

Q199: In addition to the systems touched in the Advancement Engine Next Lots, are there any other systems that you would need to integrate?

Answer: The Foundation is looking for an integration platform that includes all data sources -- not just the Advancement Engine Next lots.

Q200: Will integration requirements stop once these are done? Or would you prefer to use the tool and the skill set you have created for additional integration requirements for future projects?

Answer: The Foundation will leverage the integration platform for future projects, not just those items mentioned in the ITN.

Lot 2 or 7

Q201: Is there a need for an enterprise data warehouse for the foundation?

Answer: The Foundation currently has an in-house data warehouse on Oracle that it may choose to retain or replatform to a new environment in the future (including the possibility of a cloud warehouse). Any new components of the data environment should support either strategy without a wholesale disruption of the business should a warehouse transition occur.

Q202: If so, what is your strategy for that Enterprise Data Warehouse?

Answer: The Foundation seeks to have flexibility in its future warehouse strategy. It has invested considerable time in its current warehouse environment, but at the same time recognizes that new approaches are available that can save the organization time in expanding the warehouse environment. The overall strategy is to employ a logical data warehouse environment that can leverage multiple data repositories, while making the environment seamless for the end user through the use of the semantic layer.

Q203: Do you have a cloud strategy associated with this project?

Answer: The Foundation intends to utilize cloud solutions where appropriate based on the use case. Any cloud solutions should integrate with on-premises solutions and contribute to a unified data environment.

Q204: Do you have a directive on Software as a Service vs. hosting your own?

Answer: The Foundation does not have a specific architectural principle regarding the use of SaaS versus on-premises solutions. Solutions will be evaluated based upon their relevance to the support of specific use cases.

Q205: What is the project timeline for award?

Answer: See section 3.0 Schedule of Events within the ITN

Q206: Is there any Deadlines / Requirements to have all or portions of the solution operational? University, State, Federal, other requirements

Answer: The Foundation hopes to begin implementation of a new CRM and integrations solutions in January 2021. It may begin implementation of other solutions prior to the core CRM if they are needed to support its successful implementation.

Q207: How many end users will be accessing Reporting?

Answer: 400-450 potential users.

Q208: Of those users, how many would need the ability to build their own reports / dashboards?

Answer: The answer depends on what is meant by build. All users should be able to configure which reports/charts appear on dashboards & create simple look-ups; we anticipate that there will be 35 or so power users that can create more complex queries, reports, charts, & dashboards.

Lot 3 Questions

Q209: As per RFP, University is using CyberSource as payment gateway. We assume that University would like to have the payment gateway to be present in the customer facing / self-service portal. Please confirm if the understanding right.

Answer: The purpose of the portal is for end-users to view their transactional and relationship history with UF, not necessarily directly with a payment provider. We do not anticipate donors will be able to see their cybersource payment history from the portal - just their associated giving history with UF.

Q210: Are you willing to change your customer facing portal which is currently in place?

Answer: Yes, see section 1.2.2.3 of the ITN.

Q211: What tools are used to track your alumni today?

Answer: Ellucian Advance

Q212: How do alumni update their contact information today?

Answer: Via an update form on the UF Alumni Website

Q213: Are there alumni chapters across the country or around the world?

Answer: There are nearly 100 Gator Clubs around the world, including clubs in Thailand, Ecuador, France, and Canada.

Q214: How is the engagement team's success tracked? # of events, alumni engaged, # of alumni who transition from engaged to an active donor?

Answer: Engagement metrics in the future state will follow the Alumni Engagement Metrics laid out by CASE and detailed in our Lot 1 requirements. Key categories for metrics and reporting for alumni engagement include volunteer, experiential, philanthropic, and communications.

Q215: Row 611: Recommend classmate selections based on year, degree, activities, and other attributes for P2P fundraising volunteers.
Can you share more examples of how this would work? Who is receiving the recommendation?

Answer: The Foundation envisions that staff receive recommendations of classmates who could potentially serve as fundraising volunteers based on year, degree, activities, and other attributes. A second example would be the ability to recommend prospects to volunteers for personal outreach based on the criteria outlined above.

Q216: R149 - Integrate with staff calendar applications. Question: What calendar applications are in use at the Foundation and on UF Campus that the solution would need to integrate with? (Google, Outlook etc.)

Answer: Microsoft Outlook; integration with multiple exchange systems is required

Q217: It is the intent to keep the HigherLogic community’s platform and integrate it with the new CRM or replace it? To replace it, can you please provide with the annual cost of HigherLogic? To keep it, Will the gamification be integrated with HigherLogic?

Answer: Our preference would be to identify a comprehensive solution for constituent-facing portals, which includes functionality current in place with Higher Logic. This solution should also include gamification. We are not sharing cost information at this time.

Q218: R0265 – How many alumni, donors, etc. on average log into the portal and community per day/month for profile updates, information retrieval, purchases, donations, registration, etc.?

Answer: We do not currently have a donor portal into which constituents can login, however, we average around 1300-1500 online gifts a month (with a 30-50% expected growth year over year). I would anticipate maybe 1500 logins a month in the first year after launch.

Q219: It is assumed that this will be a green field implementation and there is no requirement for any existing data migration. Please confirm.

Answer: Much of the existing Data will be imported into any new solutions.

Q220: What is the average monthly volume of transactions / documents that portal needs to handle. What is the expected growth in next 2-3 years?

Answer: We do not currently have a portal or any similar capability, so it is difficult to judge what usage for such a product would look like. I would anticipate usage to grow pretty steeply over the first 2-3 years of implementation. However, if we're including gift transactions in this count, we've had about 15,000 online gifts this year and we're tracking to grow by 40% each year.

Lot 3 or 4

Q221: For Lot 3 and Lot 4, would the donor portal need to connect to the online giving system directly, or would an integration that both tie to to CRM accomplish what is needed?

Answer: Either solution would be acceptable

Lot 4 Questions

Q222: R0711: Can the team please provide examples of the desired form logic?

Answer: If the donor indicates that a gift is in memoriam or tribute to someone via checkbox or yes/no question, secondary/hidden fields are revealed asking for the information related to the tribute (tribute name, email address, etc)

Q223: R0715: Could the team please provide examples or description of "non-giving forms”?

Answer: We currently have contact forms, forms where selected donors can select from among their available benefits for certain giving societies, forms to sign up for certain benefits

Q224: R0716: Do you allow donors to choose more than one fund to associate their donation with? Can you provide an example?

Answer: We do currently allow donors to select more than one fund. An example would be a campaign for student programs and a donor would visit the page for general college support for the College of the Arts and add a donation for $250 and then visit the fund for our first-time college student fund and add a $200 donation there. They would then check out and be charged one transaction for $450.

Q225: We understand the Foundation has been using the current GiveGab Enterprise (with Cybersource as payment gateway) platform for 3 years and will continue for at least 2 more years with a redesign in the near future to improve the donor experience.
Is there a constraint to continue with current GiveGab for next 2 years, or you are flexible for other solutions that can integrated with the donor and constituent database of record.

Answer: We would consider another online giving solution if it offered the necessary functionality and better integration with the CRM.

Lot 4, 5 or 6

Q226: It is assumed that exiting solutions will continue but redesigning will be required for enhanced user experience and seamless integration with core CRM. Please confirm.

Answer: The Foundation is seeking solutions for all eight Lots highlighted in the ITN. We will assess new and existing solutions to determine what is best for the Foundation and constituent engagement.

Lot 5 Questions

Q227: Would you like to have the payment gateway link in the landing page of the event management mails / forms / communications?

Answer: In general, we would expect the payment to take place at the end of event registration. If the event registration system allowed for advance registration with payment occurring at a later time, then I would expect to link to the payment gateway/page from an email reminding registrants to fulfill their registration fee commitment.

Q228: Given current world events, should the Event Management track focus on virtual events as much as in-person? (The RFP seems to suggest support primarily for in-person events.)

Answer: The event management solution should be able to manage both virtual and in-person events. If the question is directed at the execution of virtual events

Q229: Can you elaborate on the inventory tracking needs (R0327, R01089)? Does this just pertain to giveaways at events? Is COGS needed and if so, what basis is used? Is this system managing sales of items, shopping cart, etc. or is there an integration to a shopping cart and fulfillment center?

Answer: The desired inventory functionality involves both giveaways for the events and event equipment, signage, technology, etc. that is available for use in executing an event. Ideally, the inventory for giveaways would include what the giveaway is, its cost, its real value, quantity on hand, location, etc. The equipment inventory would have similar fields, but instead of tracking who is permanently removing items, there would be a scheduling/reservation component as well as a checkout component.

Q230: Is there a defined timeframe for the continued use of CVENT events functionality?

Answer: There is no defined timeframe. We plan to continue using the platform until another platform with greater functionality is identified. We are on an annual contract, but due to lead time on events, migration to any new solution would take a minimum of two years.

Lot 6 Questions

Q231: What's your roadmap on SFDC marketing automation?

Answer: There is currently no roadmap. That would be determined once a CRM product is selected and available solutions are presented.

Q232: It was listed that you emailed 20 million records via Marketing Cloud, could you clarify further how many active unique constituents you engage/email?

Answer: We have between 285k and 300k unique active constituents that we email

Q233: Which marketing analytics tools are UF admins using?

Answer: Google analytics

Q234: How many emails do you have?

Answer: 944K (includes all active emails on any record) for 688K entities

Q235: What email marketing software do you use?

Answer: Salesforce Marketing Cloud

Q236: How many email campaigns yearly?

Answer: We do between 1100 and 1200 emails per year.

Q237: Do you have an automated direct marketing acknowledgement setup?

Answer: The only automated touchpoint we currently have in place after an online gift is the emailed gift receipt.

Q238: Re: 1.2.2.6 Lot 6: Digital Marketing In preparation for integration of Marketing Cloud with a newly-implemented Advancement CRM solution, has UF performed any initial architecture preparation work with legacy solutions? Asset inventories? Data assessments? Other activities?

Answer: We are in the process of doing data assessment and clean-up.

Q239: By including "Email Communication Best Practices" in the desired competencies, is UF indicating a need for strategic services beyond implementation to support best practices in campaign implementation?

Answer: Not specifically; however, it is our expectation that the vendor we select as a partner in the digital communications space is a leader and well versed in best practices. This expertise will inform an implementation strategy that increases KPIs for our email communications.

Q240: One of the vision statements is to achive Automation/AI. Does Foundation have any exisitng AI/ML or RPA solutions implemented? If yes, what are the tools and technologies leveraged?

Answer: No, we do not.

Lot 7 Questions

Q241: The data catalogue would be acting as the central data repository, which deduplicates and centralizes data, and would be sharing the data to all the syndicated applications which are integrated. Is our assumption correct?

Answer: Both the data catalog and integration environment should underpin a data hub approach that would allow for the easy consumption of authoritative data by other applications from a single source.

Q242: Are you expecting your data repository to be changed to new data repository?

Answer: The Foundation will probably leverage a combination of existing data repositories and create new data repositories to replace legacy environments. An example of a new data repository may be a replacement for the current CRM operational data store.

Q243: Data search: Is it only metadata search or search based on content?

Answer: The Foundation would like to be able to search on content as well as metadata.

Q244: Is any tool preselected for Data Governance implementation or open for suggestions?

Answer: The Foundation has not pre-selected any solution.

Q245: Recommendation Engine : Is the scope involved in creating and operationalizing the recommendation engine or just operationalizing it

Answer: The Foundation would be interested in a scope with both creating and operationalizing the recommendation engine.

Q246: What are all the Data Management tools present in the ecosystem for interoperability

Answer: The tools used by the Foundation are found in Appendix 1.

Q247: Is there any evaluation of MDMs for your data catalog lot?

Answer: The Foundation is pursuing a Master Data Management initiative. The adoption of a specific strategy or solution for MDM has not been decided upon.

All Lots

Q248: Row 782: Use single authentication sign on for Advancement Employees. What standard of single sign on?

Answer: SAML 2.0