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April 28, 2020

ADDENDUM #2 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 additional technical questions and inquiries submitted prior to 5pm, April 17, 2020.**

Sincerely,

Nicola Heredia

Nicola Heredia, Director
Procurement Services

Please acknowledge receipt of Addendum #2 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

_______________________________ _______________________________
Signature Company Name

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Email Address

_______________________________ _______________________________
Company Address City/State/Zip

Responses to questions submitted for UF's ITN Florida ITN21NH-100 Advancement CRM, Integrations and Partner Solutions

General

Q249: How does the University want vendors to respond to requirements where they do not currently meet the functionality or functionality is on the product roadmap?

Answer: Do not enter a value for that row and leave it blank.

Q250: The response code for customization acknowledges there is difference between customization and configuration. While there is a code for customizations, how should vendors respond to requirements that would be addressed through configuration instead of customization?

Answer: Indicate the solution as "Solution in Baseline Product" and indicate that it is configurable to meet the requirement in Column J in Tab 3 of the Response Workbook.

Lot 1

Q251: R0102- Take a course of action based on algorithms at the development officer level when things are delivered to specific development officers. Please provide an example or use case.

Answer: The system would suggest courses of action or a workflow to a Development Officer when new information comes into the system or when an assignment is made.

Q252: R0107- Account for outliers within a recommended data set and note on the donor's profile that they are an outlier and to opt them out of specific communications. Please provide an example of an "outlier".

Answer: In this case, an outlier is an individual who does not meet the specifications to be sent a specific communication. For example: An alumni from the College of Engineering does not want to donate to the College of Engineering because they had a poor experience. Pull this individual from a data set if needed. The system would recognize that this outlier had a negative experience and would therefore remove them from the list of individuals to receive a communication.

Q253: R0121- Create predefined filters using set criteria (Ex. select lists), and have these filters be transparent throughout the organization. Please provide an example or use case.

Answer: At the university-level, annual giving solicitations apply a standard set of exclusions (e.g. board member, open proposal record, principal gift donor, etc.). When a unit wants to send out an annual giving appeal, we would want those exclusions applied when they indicate they are going to use the data for a direct mail appeal. The exclusions applied by making that selection would be transparent to the person running the report.

Q254: R0151- Tie a referral to a gift (university wide gift or unit specific gift), contact report, and proposal record. Please define a referral. Please provide an example or use case.

Answer: A referral is an originating flag for the prospect that allows us to understand how a prospect enters into the cultivation cycle/pipeline. For instance, if a prospect is identified at an alumni relations event we would want to be able to indicate that and ultimately report on how effective different methods of prospect identification are for driving pipeline. Other examples could include leadership annual giving officer visits, prospect research, or gift planning marketing response.

Q255: R0157- View and compare reports across units simultaneously. Please provide more detail or an example.

Answer: For instance, an AVP in development who oversees multiple units may want to look at major gifts in the current fiscal year for all of their units at one time. Another example would be development/campaign operations wanting to view proposal activity across a set of units that they could select (e.g. units with 50K alumni or fewer or units with more than 5K alumni in NYC).

Q256: R0190- Send email confirmations and a notification through the CRM to the appropriate user/department when data has been uploaded successfully. Please clarify the following note associated with this requirement: "As long as unsubscribing is an option".

Answer: We would like the ability to unsubscribe from in-system notifications when a data set has been uploaded within the system. This is true for all types of in-system notifications.

Q257: R0232- Apply a model score for the top likely vehicles for gifts (including real estate). Please provide an example or use case.

Answer: We would want to have models that score the likelihood of a prospect to make a particular type of gift e.g. bequest, insurance, CRUT, real estate, etc. Prospects with high likelihoods to make these types of gifts would be assigned to development officers who specialize in working with donors on these types of complex gifts.

Q258: R0346- Create and store predictive models for different programs within the system. Please provide additional info or a use case.

Answer: Given the breadth and complexity of the University of Florida, not all units, in practice, have the same thresholds for significant gifts to the unit. With this in mind, top prospect models should be variable by unit. We may also want to create project-specific predictive modeling for top prospects beyond unit affinity so the ability to create a separate fundraising program/interest, create a model for top prospects to that initiative and apply those scores at the prospect level with visibility to the user.

Q259: R0492 - Create a toolkit that can be housed in the system and is easy to update with new or changed information. Documents in the toolkit will be downloadable and customizable based on the audience. Please provide additional information about the toolkit?

Answer: This could include templates for prospecting, gift agreements, donor acknowledgements, donor profiles, unit profiles, regional profiles. The development officer could select from the templates, customize the content to the unit and the donor.

Q260: R0498- Include wizard functionality when pulling reports to suggest an action. Please provide an example or use case.

Answer: A development officer pulls a list of alumni in a particular region to plan travel and the system identifies and flags those prospects in the list who should be visited for qualification, stewardship, cultivation or solicitation.

Q261: R0780- Define desired data fields for all data requests with logic to prompt additional questions based on data fields entered. What is the purpose of this requirement? Please provide a use case?

Answer: This requirement refers the ability to establish data definitions within a data request form with logic to prompt additional questions in order to gain additional information from the requester based upon query fields that were entered.

Responses to questions submitted for UF's ITN Florida ITN21NH-100 Advancement CRM, Integrations and Partner Solutions

Q262: R0781- Design a customized data request form with mandatory fields and description field. Please provide more detail about the data request form. What type of data are you requesting?

Answer: When a unit needs to make an ad-hoc data request that would be fulfilled by the data team, we want that done through a customized form within the system and designate some fields as mandatory to ensure that the data request is complete minimizing follow up with the staff person for clarification.

Q263: R0897- Allow for remote deposit capture of bank deposit and gift documentation and can support batch handoff between RDC processor and gift processing staff. What is RDC?

Answer: Remote Deposit Capture

Q264: R0965- Set a sunsetting timeline automatically within the PSR workflow. Please provide more detail about this requirement. What is PSR?

Answer: Prospect Strategy and Research

Q265: R1135- Exclude gift transactions from FRP or other standard reporting, but apply to cash. What is FRP?

Answer: Fundraising Performance (i.e. total commitments and campaign reporting). For instance, a pledge payment counts as cash but not in our total commitment since the pledge was booked at its full value.

Q266: R1137- Handle unique gifts when only cash or FRP are required, but not both. Please provide additional information about this requirement. Please provide an example or use case.

Answer: Similar to the above but regarding more complex gifts such as insurance, trusts, or securities. These payments may be tied to a pledge that was previously booked but now need to be pledge payments countable in the cash totals for the year that they are given but not in total commitments/campaign.

Lot 4

Q267: R0715- Create non-giving forms within the system. Please provide an example or use case.

Answer: See answer for Q092.