

RFP #24-0515 Advancement Constituent Relationship Management (CRM) Solution

Question	RFP Section	RFP Page	Question	Response
1	1.2	3	Are there any institutional initiatives (e.g. Capital Campaign, Student System Replacement, etc.) that could affect resource availability?	No
2	1.2	3	Is it possible to provide a breakdown of user counts by role (e.g. Advancement Services/Operations, Gift Officers, etc.)?	We have three full-time staff members in College Advancement and a part-time student worker. Two of these users will use the system widely (contact reports, running reports, viewing gift and bio data, etc.). The other two users will mostly use the system for data entry.
3	1.2	3	<p>Along with migrating your institution's legacy data:</p> <ol style="list-style-type: none"> <li>1. Are there any additional shadow databases that need to be migrated?</li> <li>2. How many total New Constituent records will need to be migrated?</li> <li>3. How many total Income/Gift records will need to be migrated?</li> <li>4. How many new Constituent (Entity) and Gift records are estimated to be added on a yearly basis?</li> <li>5. Are you aware of any data issues in your current legacy system (e.g., historical data issues from a prior conversion that were never cleaned up, etc.)?</li> </ol>	<ol style="list-style-type: none"> <li>1. Not that we are aware of at this time.</li> <li>2. Approximately 4,000-5,000</li> <li>3. Approximately 50,000 records</li> <li>4. Unknown. We will add approximately 600-1,000 graduating students each year. We will add new donors each year, and that will vary.</li> <li>5. Yes, there are several "data issues" that need cleaned up.</li> </ol>
4	8.2.9	18	Does your institution track paid alumni dues/memberships?	Not at this time.

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5	8.2.9	18	How many events does the institution host annually?	Varies, but generally 3-4 signature events and 8-10 other events
6	8.2.9	18	What is the total number of Annual Registrations?	Unknown, not currently tracked
7	8.2.9	18	What is the total number of event creators?	Currently 4
8	8.2.9	18	What is the total number of users who need visibility access (not event creators)?	Unknown, but possibly 3-5
9	8.2.9	18	Is there any event data that needs to be migrated? If so, what volume?	No
10	8.5	20	How many emails does the department send to constituents per year?	Currently between 10-15 but we'd like to do more
11	8.5	20	How many contacts (unique email addresses/handles) are there in your marketing database?	Approximately 20,000 – 25,000
12	8.5	20	How many users are there in the current marketing automation system(s)?	2
13	8.5	20	How many departments will be utilizing the solution?	Unknown, but possibly 2-4 departments
14	8.5	20	What are your key objectives for digital marketing/marketing automation?	Better and more frequent communication with our stakeholders
15	8.5	20	What is your current email system(s) being used for today (mass emails, drip campaigns, fundraising, other)?	Constant Contact
16	8.5	20	Are you planning to retire all other email solutions as part of this transition?	Yes

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17	8.7	20	Are you using payment processors today for financial transactions? If yes, which products and for what type of information?	Yes. Constant Contact for events. GiveCampus for philanthropic donations
18	8.2.1.1		Are you looking for a marketing tool for marketing campaigns and email tracking?	Section 8.2.1.1 is related to sending the constituent/donor a thank you message. Marketing tool does not apply.
19	8.2.1.3		Please indicate who outside of the advancement team will need access. Are they outside Lewis Clark State College or internal? How many users would need this access?	Possibly Athletics. Everyone who will have access will be internal employees. Unknown on number of users – possibly up to 6.
20	8.2.1.4		Do you have a print vendor that you currently use. If so, please identify which organization?	No
21	8.2.1.7		Does the scope include tracking of scholarship awards?	We have a current scholarship platform for students and financial aid. Ideally, we can make these systems talk – or at least transfer data from the scholarship portal to the new advancement software.
22	8.2.3.5		Do you have a preferred Wealth Screening tool?	Not yet, this phase will happen after database is implemented and everyone is trained.
23	8.2.9		Are you looking for an Alumni portal to view donations, update their profile information and remain engaged with the College?	This is not top priority, but something we are interested in for future.
24	8.2.11.2		Are you looking for real time integration or batch processing with NextGen. Does NextGen have Open API's. Do you have a preferred integration tool?	Batch processing. Unknown about Open API and preferred integration tool.
25	8.2.11.4		Are you looking for an event management solution or only track attendance via file imports?	Currently only for file imports