89REQUEST FOR PROPOSALS #2021-001
Software Solution for Advancement / Community, Donor and Alumni Engagement
RESPONSE ADDENDUM # 2
October 16, 2020

CLARIFICATION

The response deadline is modified to **November 6, 2020, 11:59 p.m. EST**

Key data points requested in the questions below:

CAMPUS	#Constituent Records To Migrate	#Gift Records to Migrate	#New Gift Records Annually	#New Constituents Annually	# Alumni Logins	#Emails Sent Annually	#Unique Email Addresses - Mkting DB
Question	**12**	**13**	**14 & 18**	**14**	**22**	**25**	**26**
UMS	1,064	5.213	21	0	0	0	0
UM	248,651	747,700	12050	6,500	875	1,700,000	56,320
UMA	21,069	17,768	982				
UMF	44,442	132,811	1538				
UMFK	11,826	15,878	508				
UMM	10,707	12,803	83	100	0	0	0
UMPI	12,895	15,043	125	200	0	96,000	4,000
USM	87,217	221,933	4000	2,350	111 p/m	2,523,834	52,000
ME LAW	10,278		1,156	500 approx.		60 approx.	7,331

CAMPUS	#Mkting Automation Systems (Engagement)	#Annual Text Messages & Push	#Annual Social Media Platforms	#Annual Social Handles	#Advance Profiles
Question	**27**	**28**	**29**	**30**	**34**
UMS	0	0	0	0	29 for all campuses
UM	26	0	3	3	n/a
UMA					n/a
UMF					n/a
UMFK					n/a
UMM	1	0	1	1	n/a
UMPI	4	0	1	6	n/a
USM	4	0	3	3	n/a
ME LAW	4 users	0	0	8	n/a

CAMPUS	#Advance Head Count	#Advance Solution Staff Access	# Major Gift Officers	# Gift Processors	# Executive Level	#IT / Technical	Alumni Relations	Stewardship	Annual Fund / Marketing	Bio / Research	Read-only users	Gift Match RV, last 3 years, total
Question	**44**	**7, 10, 17, 45 & 92**	**93**	**93**	**93**	**93**	**93**	**(93)**	**(93)**	**(93)**	**93**	**119**
UMS	0	6	0	0	0	6	0	0	0	0	0	0
UM	38	100	14	5	5	4	7	2	6	5	52	1,075,008
UMA	2	2										
UMF	8	8										
UMFK	2	1										
UMM	1	7	0	2	0	2	0	0	0	1	2	0
UMPI	1	6	1	1	1	0	1	1	1	3	0	31,000
USM	18	27	3	2	4	2	6	0	0	0	11	57,072
ME LAW	2	4 - 8	1	1	1	1	2	1	2	1	3	22,000

Maine's Public Universities
UNIVERSITY OF MAINE SYSTEM

QUESTIONS

1. Whether companies from Outside USA can apply for this? (like, from India or Canada)
ANSWER: Refer to RFP Section 1.3.2 Eligibility to Submit Responses.

2. Whether we need to come over there for meetings?
ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews

3. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)
ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews.

4. Can we submit the proposals via email?
ANSWER: Refer to RFP Section 1.3.8.

5. Is the U of Maine system moving away from current alumni engagement platform to implement a new partner or do you plan to renew the current partner?
ANSWER: Refer to RFP Section 1.1.3.

6. Do system schools currently have an email platform? If so, which provider?
ANSWER: University of Maine System's standard platform is google email. There may be other email solutions attached to marketing platforms, etc.

7. How many users/seats does the U of Maine system anticipate for all campuses using the platform?
ANSWER: Refer to Addendum 1 Clarification Section.

8. Do the system schools utilize crowdfunding or giving day platforms? If yes which provider?
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

   Some campuses currently utilize GiveCampus and iModules Crowd Funding

9. Please confirm if each campus listed in RFP will each require an Advancement CRM system dedicated to their unique users and constituent record sets or if a central CRM system for all campuses is preferred?
ANSWER: Decision is pending the results of the RFP process.

10. How many users will be using the new Advancement CRM? Users being internal (employees, staff, faculty, etc). Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.

11. What other systems will need to integrate with the new Advancement CRM? If possible, please describe for each Campus the method of integration (flat file, API, etc.) and frequency preferred for the different system integrations.
ANSWER: Please refer to RFP Appendix H, Question 4 and Appendix H2

12. How many total constituent (entity) records will need to be migrated to this new Advancement CRM? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.

13. How many total income/gift records will need to be migrated to the new Advancement CRM? Please specify for each Campus if possible.

Maine's Public Universities

UNIVERSITY OF MAINE SYSTEM

ANSWER: Refer to Addendum 1 Clarification Section.

14. How many new constituent (entity) and gift records are estimated to be added on a yearly basis? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section

15. Is it possible to obtain details on numbers of Advancement System users by Role (Frontline Gift Officers, Operations, Executive, etc.) Please specify for each Campus if possible.
ANSWER: **ANSWER: Refer to Addendum 1 Clarification Section**.

16. What solutions are you currently using if any for (if not described in the RFP):
    - Analytics/Reporting
    - Integration
    - Email/Calendar Client
    - Single SignOn

ANSWER: Please refer to RFP Section K and RFP Section H2 Question 147

17. How many of the total users are part-time employees? Please specify by campus if possible
ANSWER: Refer to Addendum 1 Clarification Section.

18. Please confirm the total number of donation transactions for FY19 Annual Fundraising. Please specify for each campus if possible.
ANSWER: Refer to RFP Section 1.1.3

19. For an external constituent portal, please indicate which of the following features are of interest: Events, Volunteer Management, Chapters/Clubs, Mentoring, News, Directory, Online Giving, Profile Updating/Viewing, Giving History Portal, Job Posting and referrals. Please specify for each Campus if possible.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. In RFP Appendix C the Respondent is asked to provide the solution to supprot those requirements in Appendix C, Table 1. For anything that would be considered optional the Respondent should place that in Appendix C Table 4.

20. How many total Alumni records will need to be migrated to this new Advancement CRM? Please specify for each Campus if possible.
ANSWER: Refer to RFP Section 1.1.3

21. How many constituents (external) would need access to an external-facing portal (ex: Alumni Community)? Please specify for each Campus if possible.
ANSWER: Refer to RFP Section 1.1.3

22. What is the usage (logins per month, number of users) of the existing Alumni portal? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.

23. Please confirm if each campus listed in RFP will each require a Community, Donor and Alumni Engagement System dedicated to their unique users and constituent record sets or if a central Engagement system for all campuses is preferred?
ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

24. What is/are the current marketing automation solutions serving these communications channels: email, mobile text, and social media? Please specify for each Campus if possible.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

25. How many emails does the department send to constituents per year? (Ex: 10M annually or 1M monthly)? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.

26. How many contacts (unique email addresses/handles) are there in your marketing database? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.

27. How many users are there in the current marketing automation systems? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section
This answer was provided with respect to the Engagement Solution only.

28. How many text messages and push notifications does the department send to constituents per year? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section

29. How does the team currently make use of social media platforms (publishing, 1:1 engagement with constituents, etc.)? Please specify for each Campus if possible.
ANSWER: Refer to Addendum 1 Clarification Section.
Additionally, the RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

30. How many social handles are managed from a publishing or engagement perspective today (Ex: 5 Facebook handles would equate to 5)? Please specify for each Campus if possible
ANSWER: Refer to Addendum 1 Clarification Section.

31. Do you currently conduct social listening queries to understand what is being "said" to your social handles or about any of your institutions? Please specify for each Campus if possible
ANSWER: Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

To our knowledge the campuses do not use social listening queries.

32. Do you currently conduct paid digital advertising through platforms such as Google AdWords, Facebook, LinkedIn, Twitter, Instagram, etc? Please specify for each Campus if possible.
ANSWER: Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

USM, Maine Law, UMPI, and perhaps others use – Facebook / Facebook Ads

33. What (if any) use of online surveys does the department make? Please specify for each Campus if possible.

ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

34. How many profiles do you have set up in Advance?
ANSWER: Refer to Addendum 1 Clarification Section.

35. When you say that you want a 'single solution' for both advancement and alumni engagement, does that include systems built on the same platform and integrated?
ANSWER: Refer to RFP Section 1.1.3

36. You ask for riders for the master agreement to be included with the submission, including an implementation timeline. Just want to verify that it is understood that the timeline will be a sample and this would be finalized upon award.
ANSWER: Understood

37. Will you a accept joint bid package for the advancement solution and the alumni engagement solution?
ANSWER: Yes refer to RFP Section 1.1.3

38. Recognizing the University of Maine Systems' enterprise student salesforce approach, what is the advancement approach regarding enterprise CRM?
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices. There is additional guidance on possible awards in RFP Section 2.2.

39. Do you anticipate a single Advancement database that all campuses will access or individual instances of the Advancement database with only that campus specific prospects and donors.
ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

40. If you intend to implement a single Advancement database that al campuses will access, will all campuses have access to all prospect / donor records or is it anticipated that each campus will only have access to their own prospect / donors?
ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

41. In your Advance system, are you sharing ALL your TMS values among all campuses, or do the campuses have different sets of TMS values?
ANSWER:
For the schools on Advance, we share TMS values related to gift processing (transaction types, etc.) as well as the Allocation table. Generally TMS tables related to bio or prospect data are location specific, although we are mostly consistent with our entity types and address/email/phone types.

42. Will financial transactions be fed to multiple Peoplesoft systems and/or to other systems, such as other 501c3s/giving partners?
ANSWER: Please refer to RFP Section H, Question 4 in particular

43. **How many different gateways/sources are you accepting gifts from?**
ANSWER: Please refer to RFP Section K, Technical Interface Data Exchange, Question 4

In addition to Touchnet, we also use Stripe and PayPal.

44. What is the headcount of your advancement staff at each of your 7 campuses?
ANSWER: Refer to Addendum 1 Clarification Section.

45. What is the # of staff expected to have access to the Advancement Solution (CRM) at each location?
ANSWER: Refer to Addendum 1 Clarification Section.

46. Does the University of Maine already have Microsoft Dynamics 365 Seat Licenses? If yes, approx. how many at each location and do they coincide with those needing access to the Advancement Solution?
ANSWER: Yes the University of Maine System has an enterprise license for Microsoft. Please refer to numbers provided in this addendum for staff access. The license provides access to "Dynamics 365 Business Central for Information Workers." Additional licenses (and cost) would likely be required if Dynamics is reaching out to the general public or a public website.

47. Does the University of Maine already have a volume license agreement with Microsoft to procure Microsoft Dynamics 365 Seat Licenses? If so, are you able to share what those costs are so that we can include reference to those in our response?
ANSWER: Yes the University of Maine System has an enterprise license for Microsoft, we do not need you to include that cost in your proposal submission.

48. Could you share a list of a few common reports your users run?
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

Sample reports include (*this is not intended to be an extensive list*):

- **Generation of receipts for donors who give by mail, over the phone or in-person. This includes everything from simple gifts via cash, gifts of stocks through corporations covering a donor, or physical gifts of property, and many other variants.**
- **A report that summarizes transactions by agency (Foundation, University, etc.) to reconcile against financial systems**
- **A one page report that offers a quick overview of an entity's relationship to the institution (Spouses, giving summary, recent gifts, activities, addresses, wealth ratings, etc.)**
- **Reports on the prospects in each gift officer's portfolio offered as a spreadsheet detailing various aspects of their record.**
- **Reports on specific campaigns, appeals, and/or pledges.**
- **System administration level reports, i.e. active / Inactive user reports and their permission levels.**
- **Data integrity reports; i.e. bio-checks, gift checks.**
- **Does your solution provide ability to run an annual report (as of 6/30) that contains information for all outstanding pledges: purpose of the pledge, donor's name, date of original pledge, amount of original pledge, payments to date, and remaining pledge payments by fiscal year including any amount that is overdue for the current or prior years.**
- **Refer to RFP Appendix H2 for other report examples.**

49. Is there a level of data sharing between the various campuses for an Advancement Solution or will each campus operate independently?
ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

50. Does the University and/or the Advancement departments at each of the 7 campuses have access to Microsoft Power BI? If only certain campus, could you list which ones?
ANSWER: All University of Maine System users have free licenses to Power BI and so can act as data consumers. Some subset of users in very few departments (mostly IT and IR) have access to Power BI pro licenses, and thus can act as report builders. UMS does license premium capacity for limited internal reporting functions for those departments with pro licenses.

51. What is your desired timeline for implementation across business units and within central teams?
ANSWER: Decisions concerning timeline in the selected system are pending and respondents should provide information about what approaches they recommend and can support and where appropriate the University staff needed from the campuses and internal IT staff to provide support for the implementation, etc,

52. Please describe the University's current pain points and where CRM and engagement needs can be improved with a new CRM.
ANSWER: Refer to RFP Appendix H2 for the list of requirements.

53. Has the University worked with implementation partners or services providers for its existing advancement CRM deployments and upgrades? If so, please name the incumbent(s).
ANSWER: None to identify

54. What are some challenges unique to the University that you think proposing vendors should be aware of as they compose their responses?
ANSWER: Please refer to RFP Section 1.1.3.

55. Is there a data warehouse or data lake in place to manage data archives or records from external systems? If so, please explain how existing advancement systems interface with a data warehouse or data lake.
ANSWER: Currently there is no ties to the University's data warehouse.

56. Which middleware or (ETL) tool does the University prefer to use for data migration and integrations? Please explain how will be involved with data migration and integration processes.
ANSWER: Please refer to RFP Appendix K, Technical Interface Data Exchange Requirements.

57. Please describe in detail all of the external data sources that the University intends to integrate with the new CRM system, including integration method, frequency, and directionality. Is an entity relationship diagram available the University could share?
ANSWER: **Please refer to RFP Appendix H, Question 4 and RFP Appendix H2**

58. Are there any systems that the University intends to retire following the implementation of a new CRM?
ANSWER: Refer to RFP Section 1.1.3, it will depend on the award.

59. How is gift matching currently managed and tied to constituent Employer records/data?
ANSWER: Please refer to RFP Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

When the donor informs us of a matching gift, we apply a claim against their original gift, although many matched gifts arrive without a prior claim. When corporations (or their charitable DAF or Foundation) send us the actual match, we enter as a gift from the organization and link it to the original gift.

60. Who from the University is responsible for maintaining and modifying the existing CRM used for advancement-related business processes and activities? Please provide a breakdown of staff that will be supporting a new platform post go-live.
ANSWER: We will provide the staff implementation team based on the advice/needs identified by the Respondent in Appendix H.

61. Are there any existing or desired third-party tools or applications that the University would like to have connected with its new CRM? (for example, Cvent, Qualtrics)
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

62. Does the University wish to migrate or connect any existing paper, web, or electronic forms to new systems for automation and reporting purposes? If so, please explain further.
ANSWER: The University would consider options for this moving forward and should you have this option please provide any additional recommendations based on best practices for the evaluation team's consideration.

63. Does the University include evaluation surveys to gather feedback regarding results that impact or drive constituent record updates or communications?
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

64. What types of events is your team hoping to run with the new solution? E.g. Virtual, onsite. Reunions, athletics, etc.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

65. Please explain further any desired or identified communication plans and strategies to be executed for engagement, capital campaigns, CRM business process automation, and marketing and communication objectives.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

66. Does the University currently have a system or systems that manage subscription preferences for advancement constituents? If so, please explain further. If not, are there any documented requirements that can be shared? How many business units may need to be incorporated into an advancement communications subscription center?
ANSWER: Please refer to Addendum 1 Clarifications Section

67. How much historical engagement data exists currently (Contact record count and years of data). How much historic engagement data should be retained (communications history)? Please detail how much data and from which systems?
ANSWER: Please refer to RFP Section 1.1.3 and RFP Appendix H2 for details on historical data.

We have 340,000 rows of contact report data (much of which reflects non-solicitation type mass mailings or email), over a time span of 46 years.

68. Please share the current annual or monthly email send volumes (across all active platforms used for communications)? What is the expected volume of data being transmitted per day?
ANSWER: Please refer to Addendum 1 Clarifications Section

69. Is there an existing SMS platform used by the organization, or will SMS functionality be new functionality?
ANSWER: Currently the University is not using an SMS platform, however if the solution you are proposing uses an SMS platform the evaluation team would be interested in reviewing the options.

70. Do you currently or intend to use vanity SMS shortcodes? If so, please explain how many and use cases.
The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

71. Is there an existing Social Media management platform used for sharing information or establishing constituent engagement, or will Social Media functionality be a new engagement tool?
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

72. Please detail any existing constituent/alumni portals and the functionality each portal environment facilitates for users.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

73. Are there desired improvements to existing portals or intentions to retire old portal technology in favor of new? Does planned net-new portal functionality extend beyond maintaining bio/demographic information, viewing gift history, and printing receipts? If so, please explain further.
ANSWER: The RFP provides an explanation of what the University is looking for in a solution in RFP Sections 1.1.3 and Appendix H2. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

74. Please detail if payment gateways are in use for payment processing. Are there any special or different arrangements to manage international payments?
ANSWER: Please refer to RFP Section K, Technical Interface Data Exchange, Question 4

In addition to Touchnet, we also use Stripe and PayPal.

75. Please explain where gateways are associated with specific functional areas and departments. Will multiple payment processes need to be managed within a single transaction? Will gateway transaction data be maintained external to the proposed CRM system?
ANSWER: Refer to RFP Appendix K, Technical Interface Data Exchange, Question 4
We're currently siloed, but decisions about how payment processes will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

76. Please explain the University's existing advancement-related call center approach and the intended future call center requirements as a part of the new CRM technology. Is CTI integration with CRM needed? If so, which VoIP system is used?
ANSWER: We do not have a formal centralized process for this currently or use related technology solutions to support.

Maine's Public Universities

UNIVERSITY OF MAINE SYSTEM

77. What types of new metrics/activities does the University want to track?
ANSWER: Please refer to RFP Appendix H2 Reporting/Analytics section of requirements

78. Are there current enterprise Business Intelligence solutions available for enterprise or data warehouse reporting and dashboards? If so, please explain further.
ANSWER: All University of Maine System users have free licenses to Power BI and so can act as data consumers. Some subset of users in very few departments (mostly IT and IR) have access to Power BI pro licenses, and thus can act as report builders. UMS does license premium capacity for limited internal reporting functions for those departments with pro licenses.

79. What is the preferred method of training and on-boarding for advancement functional and technical staff? (e.g. On-demand, self- learning; initial "train the trainer" sessions; custom engagement)
ANSWER: **Please refer to RFP Appendix H2 Documentation/Training section of requirements**

80. If both onshore and offshore personnel were offered, would the University of Maine accept a blend of onshore and offshore personnel for this project?
ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews.

81. What is the University's current guidance and vision regarding its preferences for travel and onsite activity to **support this advancement- related deployment during initiation and across the project timeline?**
ANSWER: Refer to RFP Appendix D, Rider A, Business and Performance Reviews.

82. Prior to the issuance of this formal RFP have any of the vendors being considered already provided any type of proposal, system demonstration or other information related to their Advancement CRM solutions to the Advancement staff at University of Maine?
ANSWER: No

83. Was any type of preferred vendor list already developed by Advancement or Alumni Engagement Offices prior to this formal RFP procurement process by the Office of Strategic Procurement?
ANSWER: None

84. Are any 3rd party consulting firms or outside groups involved in helping with the RFP or selection process?
ANSWER: None

85. The RFP seems to request both "individual campus" system option as well as an "enterprise option" for all campuses (except one). Will this be a group purchase – either 1 Enterprise system – or 6 University systems or 10 Campus based solutions?
ANSWER: Dependent on the solution and pricing offered.

86. Is this an "opt-in decision by school"? Will each campus make its own decision on systems?
ANSWER: Dependent on the solution and pricing offered.

87. Does each campus currently have a separate Advancement system/database? Please provide name and version for each campus. Ellucian Advance is mentioned on line 148 of the Requirements – are all campuses on Ellucian?
ANSWER:
The seven historic campuses (which includes UMM) and the System Office act as eight separate locations within one installation of Advance 2018 MLP (a version of Advance which allows campus data to be siloed.)

Maine Law uses Abila Fundraising 50 as its Advancement database (version 2018.1)

88. Since the RFP states the Law School is not looking for new Advancement System – have they moved to a different system than other campuses already? If yes, which system and when did they migrate?
    ANSWER: No

89. Is there any kind of centralized system/database/data warehouse/ reporting system currently in place across the University of Maine system? Please provide information about this if it exists – platform, version, etc.
    ANSWER: UMS currently has Power BI available, but Advancement does not currently use it.

90. If each School/Campus is on separate system now, are they all using their own coding structures for data or has any standardization been applied across all systems/platforms. In other words, will the conversion entail converting 6 or 10 completely different systems to 1 enterprise solution if that is the chosen solution?
    ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

    Yes, we will need to convert advancement systems including eight (8) systems (Advance) and possibly one (1) additional system (Abila) and three (3) iModule systems.

91. If separate "instances" are to be implemented for each school will all systems be converted and moved simultaneously or individually in sequence?
    ANSWER: We're currently siloed, but decisions about how data will be managed in the selected system are pending and respondents should provide information about what approaches they recommend and can support.

92. Please provide the number of users of the proposed system for each University or Campus for proper pricing to be calculated.
    ANSWER: Refer to Addendum 1 Clarification Section.

93. Please provide the number of users by job function at each University or Campus. (# of major gift officers, # gift processing staff, # executive level, # IT/technical, etc.)?
    ANSWER: Refer to Addendum 1 Clarification Section.

94. Any 3rd party vendor access? (mail houses, agency, caging/fulfillment)
    ANSWER: No

95. Do you plan on having non-staff users (e.g. student/volunteer access)?
    ANSWER: Yes, student employees are frequently given access to Advance.

96. In addition to the current existing database, are there any ancillary databases or data sources that need to be considered for conversion?
    ANSWER: We will need to convert advancement systems including eight (8) systems (Advance) and possibly one (1) additional system (Abila) and three (3) iModule systems. There are no additional databases or data sources that need to be considered for conversion.

97. Is budget approved and in place for the purchase and implementation of a new system?
    ANSWER: Campuses have current budgets for the current solutions.

98. The RFP indicates a scoring process will be applied and details the point system. Will results of where all vendors score be provided to the vendors?
    ANSWER: The results are provided in an award powerpoint and are available upon request.

Maine's Public Universities

UNIVERSITY OF MAINE SYSTEM

99. If responding primarily to only one solution – Advancement or Community Engagement – should vendors respond at all to the other section – if there is functional overlap that meets a requirement in the other section or simply leave the entire section blank?
    ANSWER: Please respond to the solution proposed only

100. In regards to the required response format, In Section 2- Cost Response, 3.2.2.2 "Insert Appendix C-Required Cost Evaluation Exhibits", do you want us to copy and paste all the information from the excel document into this section in addition to including the attachment? Or should we put in "please reference the enclosed excel file"? On page 23 of the RFP document, you state that an MS Excel version must be included with the submission. We weren't clear on what to put in Section 2 of our response document.
    ANSWER: Providing it in the Cost Excel sheets is all that is needed. The submission must include an excel version.

101. Similar question regarding the required response format, in Section 4, Appendix H2 Solution Requirements Matrix Section, do you want us to copy and paste all the information from the excel document into this section in addition to including the attachment? Or should we put in "please reference the enclosed excel file"? On page 57 of the RFP document, you state that an MS Excel version must be included with the submission. We weren't clear on what to put in Section 4 of our response document.
    ANSWER: Providing it in the Solution Requirements Excel sheet is all that is needed. The submission must include an excel version.

102. Do we need to include insurance certificates with our response or is this only required for the selected vendor?
    ANSWER: The awardee will need to provide prior to contract signing.

103. Will you be distributing/posting questions and answers submitted by all vendors?
    ANSWER: Refer to RFP Section 1.2.2 all communication is posted to the website noted.

104. What existing systems are in use now for your Community, Donor and Alumni Engagement solution?
    ANSWER: University of Maine, University of Southern Maine and the University of Maine Law School use iModules encompass.

105. Do you have a preferred payment gateway that you use?
    - Due to liability issues, we prefer to use third party integrations such as Big Commerce.

    ANSWER: Please refer to RFP Section K, Technical Interface Data Exchange, Question 4

    In addition to Touchnet, we also use Stripe and PayPal.

106. What are your UI/UX requirements from a public facing perspective and internal perspective? Do you have designs and style guides already?
    ANSWER: Please refer to RFP Appendix I

107. Are these the sites that you manage now https://www.umainealumni.com/
    https://securelb.imodules.com/s/300/13-ORONO/foundation/index-social.aspx?sid=300&gid=13&pgid=748&cid=1912&dids=64.473.1808.78.108.222.1885&sort=1&bledit=1&appealcode=O5462
    ANSWER: We manage a number of websites and each campus has its own branding.

108. Is there a designed data strategy for the UMS across campuses and within individual campuses designed to drive better results, a more consistent brand experience, or better fulfill the "One University" objectives? An example may include data standardization and identity resolution across email marketing, online giving, event management, membership management and social networking systems.

ANSWER: Pleases refer to RFP Section 1.1.3 and RFP Appendix H2 for requirements. Please review that section in your response to RFP Appendix G and/or H provide any additional recommendations based on best practices.

109. Does the UMS have a preference for vendors that fulfill all aspects within a particular solution versus partial fulfillment (i.e. only providing content management and email marketing, but not event management or online giving within the Community, Donor and Alumni Engagement)?
ANSWER: Refer to RFP Section 1.1.3

110. **Appendix H2 Advancement**
- **Question 4: is this asking about a historical log of gifts or one recurrent gift over multiple years?**
- **Q20: does erecipt here mean an electronic request or a format ingestible by the eReceipts app? https://www.amazon.com/Paperless-Receipts-eReceipts/dp/B00B2MQUHM**

ANSWER:
Question 4 was about recuring gifts with an undefined timeline, or pledges where the payments would be made over multiple years in a defined timeline.

Question 20 simply meant receipts that could be emailed to donor (and possible accessible online through the portal), no specific implementation was implied.

111. Cost Considerations
- In Section 1.1.3, are the # active donors encompassed in the # of alumni? Is the # of alumni the total number of subscribers, let's say, to your email database? Are there any other subscribers/contacts that would change these numbers?
- Please provide the following data on a per-school location basis:
  i. total number of sites for the UMS
  ii. site traffic #s (avg page views per mo.)
  iii. storage requirements for file and database
  iv. any requirements around a WAF or CDN
- Do you have Drupal CMS experience or resources?

ANSWER:
- **Refer to Addendum 1 Clarification Section.**
- **No, active donors included corporate donors as well as non-afflliated "friends" of the University who might make gifts.**
- **The alumni represented the count of alumni currently in our electronic database, some of which have already passed away.**
- **Our engagement database contains individuals who are not either donors, or alumni. They might be fans of our sports program, faculty or staff, stewards of funds sets up by their family members, people interested in 4-H or cooperative extension programs, ticket buyers at our museums or theaters, or other individuals who engage with the university on a non-donor/non-alumni basis but are seen as potential prospects for future giving.**

112. What is the driving need to make the investment now?
ANSWER: Refer to RFP Section 1.1.3

113. Does this project already have budgeted funds?
ANSWER: Refer to answer for question 97 herein.

114. What strategic goal of the University System does this solution support?

ANSWER: Refer to RFP Section 1.1.3

115. Is there a compelling event or sensitivity to timeline we should be aware of?
ANSWER: Refer to RFP Section 1.1.3

116. As the largest dedicated Salesforce provider, we have expertise in fundraising, stakeholder engagement in Salesforce and are confident we have a thoughtful solution for this project. Is it important for you to have a longer term partner that can extend beyond this project and into those with Admissions, Recruiting and Enrollment Management expertise (for 360 degree prospect/student engagement, for example) as well for future University plans? If yes,please provide a brief forward looking statement that clarifies big picture?
ANSWER: Refer to RFP Section 1.1.3 and RFP Appendix H2 for the requirements

117. Does the UMS have a preference for vendors that fulfill all aspects within a particular solution versus partial fulfillment (i.e. only providing content management and email marketing, but not event management or online giving within the Community, Donor and Alumni Engagement)?
ANSWER: Refer to RFP Section 1.1.3

118. (CRM Users) 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: Please refer to Addendum 1 Clarifications Section

119. (Gift Matching) Please provide the annual gift matching revenue for the prior 3 years.
ANSWER: Please refer to Addendum 1 Clarifications Section

120. (Analytics) 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 of reports or any custom dashboards.
ANSWER: There are approximately seven (7) users who manage and configure client-based configuration elements and to manage all extract, transform, load (ETL) or data loading jobs and processes.

For viewers of reports refer to Addendum 1 Clarifications Section