THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL

REQUEST FOR PROPOSALS (RFP) ADDENDUM

FAILURE TO RETURN THIS ADDENDUM IN ACCORDANCE WITH THE INSTRUCTIONS BELOW MAY SUBJECT YOUR PROPOSAL TO REJECTION

RFP Number: RFP06032024VLG
Addendum Number: 03
Addendum Date: July 5, 2024
RFP Opening Date / Time: July 19, 2024 at 2:00 PM Eastern Time (ET)

Instructions: Return one properly executed copy of this addendum prior to the RFP Opening Date / Time specified above. This addendum may be included with your proposal, or it may be emailed separately to Veronica Green at Veronica.Green@unc.edu.

A.   The following sections are hereby updated as follows:

1.   3.4.1 (e). University's Digital Accessibility Office website address added.

2.   3.5. Anticipated Go Live information added.

3.   3.5.1 Software – Security and Compliance specifications added.

4.   3.5.4 Other Services & Training and Technical support – Monthly time expectation added.

5.   3.5.5 Discover, Design and Development specifications added for clarification.

B.   Please see the following University responses to all questions received by the deadline to submit written questions of June 17,2024 at 5:00 PM ET:

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	QUESTION	ANSWER
1	For the Internal Knowledge Sharing Hub, are there any specific functionalities or requirements that the University has identified as needed?	Ability to integrate with internal dashboards, document storage repositories and training systems could be some, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
2	Has the University identified needs within the Donor Experience Platform that go beyond the platform itself, such as content optimization, experience design, business operations, etc.?	We don't have changing business operations in the scope of this project, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
3	Please confirm: The desired solution is content/engagement focused not an ecommerce solution. It should link to an existing ecommerce processing website.	Correct, our ecommerce processing system will remain separate. Although we do want to be able to link to or (possibly) embed donation/giving pages or shopping carts where appropriate and desired.
4	Can the University confirm that there are no Customer Relationship Management (CRM) functionalities that are expected within the Web CMS software other than those external systems integrated into the solution?	Correct.
5	Can the University elaborate on a use case that would be addressed with the Content Personalization functionality? Would the system be expected to track and store information on non-logged in users on an ad-hoc basis? Are there any services currently in use which are being used to identify and segment otherwise anonymous users?	We have no systems in place to identify and segment otherwise anonymous users outside of using Google Analytics to group users, but we don't have any systems to put that data into use to personalize content. Our thought was that personalized content would primarily be used for logged in users, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
6	Can the University elaborate on a use case that would be addressed with the Generative AI Content tool functionality? Is this a toolset which currently exists, or one which should be included as functionality within the proposed solution?	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do not currently use a dedicated toolset.
7	Does the University have any preference for a CMS platform which meets the stated requirements? Would the University prefer to stay on WordPress or explore alternative systems?	We don't have a preference, although we would need to understand the implications of any CMS suggested (recurring subscription, maintenance or support costs).
8	Is the University interested in integrating content with third party social media platforms, or does UDO prefer to maintain its social presence independently of the platform?	Probably keep social content independent, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
9	How many systems/platforms are currently being used by UDO staff across UNC's campuses related to fundraising activities? Is there a set list of approved technologies, or are teams using a variety of toolsets?	Not sure that we know or that there is a central list of approved technologies. Our focus with this project would be on technologies used by the central University Development Office, such as Salesforce Marketing Cloud, Blackbaud and others identified in the RFP, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
10	What URLs are expected to be incorporated under the new Web CMS portal?	183
11	Will the vendor be responsible for acquiring hosting infrastructure, DevOp tools, and other services such as Google Analytics? And is hosting expected to be provided on a third-party platform outside of the University firewall, or integrated with existing UNC hosting platforms?	We look to the vendor to recommend those solutions and we are open to all recommendations for hosting.
12	Does the University expect real-time synchronization of the solution with data from other platforms, or is this expected to be scheduled and/or ad-hoc?	Probably scheduled, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.

13	Can you confirm the roadmap developed by the digital agency will be available for review during the discovery phase?	Yes
14	What specific constituent-facing web platforms are currently in use, and what are the primary functionalities and limitations of each? Relatedly, what does the donor experience look like today? E.g., what pain points are emerging from a donor perspective, and the staff perspective?	We use many different websites and platforms, from WordPress websites with engagement content to crowdfunding sites to donor reporting platforms, without a centralized hub to tie all of those together, which makes user experience less than ideal but also means data is disconnected. But we would expect that details about this scope would be identified in the discovery process with the selected vendor.
15	Regarding the current donor experience platform, what portion of complications are resulting from constituent audience user experience vs. disconnected and inefficient systems to collect data?	About 50/50 -- the user experience is subpar at best and we collect very little data from web interactions outside of transaction information when someone makes a gift.
16	Are current issues with the internal knowledge sharing hub centered on user experience with the right resources, training, and dashboards available but not accessible? Or have the current platform's challenges prevented available resources, training, and dashboards from being integrated into the hub?	Both issues are part of the problem, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
17	Based on the answer to the above, is report and dashboard development part of the scope of work for the knowledge sharing hub?	No, this project would be focused on integration with systems.
18	Does the University want the vendor to evaluate its current intranet resources to determine gaps based on stakeholder feedback and our understanding of best-in-class fundraising	Yes, that would be valuable.
19	Based on the answer to the above, is supplementary content creation part of the scope of work, should resource gaps be identified?	Possibly, but we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do have a content creation team.
20	Have you confirmed the specific, resolvable limitations and user difficulties associated with the current platforms, or are these findings you would like to result from our engagement? Have you identified solutions to these limitations, or would these result from our engagement?	No, we would expect that details about this scope would be identified in the discovery process with the selected vendor.
21	Have you identified specific data points and metrics you are looking to capture and analyze from the Donor Experience Platform, or would these findings result from the engagement?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but generally speaking we are interested in data that would add value to our fundraising teams, such as types of content driving (or not driving) engagement, topics of content, or areas where users are experiencing issues.
22	What is the desired timeline for the development and implementation of the new platform, training for the team, and/or a communications plan for external stakeholders?	We would look to the vendor for guidance, but we do want to launch our new platforms and utilize our 1 year post-implementation support plan prior to the anticipated launch of our next comprehensive campaign in fall 2027.
23	Have you identified a target budget for this project?	The University will not disclose budget information
24	Could you please confirm if this RFP guarantees work to the awarded vendor(s) or if it functions as a framework agreement that does not necessarily guarantee a minimum amount of work?	Reference Section 6.1.2
25	Can the RFP deadline can be extended by 2 weeks?	Any changes to submission date will be posted on EvP as an addendum.
26	Can you share more specifics from the high-level roadmap your digital strategy agency prepared?	Content will be shared during the discovery process with the selected vendor.
27	Are there new brand directions, specific revenue targets or other types of media we need to be made aware of as part of this engagement?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we are not aware of any at this time.
28	How big of a role will branding / rebranding play in this engagement?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but generally we follow a modified version of University brand guidelines. UDO has an existing brand guide that will be shared with the selected vendor when appropriate.

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29	Which constituent facing-web platforms are you using? How are they failing UDO?	We use a mixture of WordPress-based content websites and a fairly basic donor platform for accessing giving data (based on Blackbaud Internet Solutions) called the Carolina Giving History site. Donors need to create a login. It's not visually appealing and it's pretty basic. It currently has total giving amount, a link to give again, payment list with ability to download receipts, gift recognition, recurring gift information and pledges. We'd like to have a more robust portal where donors can access their endowment reports, link to their volunteering information, etc. Also as mentioned in the RFP, we want to bring together our engagement-focused content with a reimagined connection to funds/giving opportunities and donor portals, while capturing useful engagement data. For our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
30	Which systems need to be built from scratch to support your new direction? Are there Software-as-a-Service platforms you are comfortable with (like AWS)?	We are open to any recommendations that meet our requirements.
31	Are there other donor portals to consider? Specifically, how does this initiative work with the current larger website - https://giving.unc.edu/?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but giving.unc.edu content would be included as part of this project.
32	Can you expand on what you currently use your intranet to do? What parts of it work, which have poor usability?	It is a WordPress site that shares internal news, links to training and dashboards, and other internal resources. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
33	Can you provide more technical detail about the current internal UDO knowledge sharing site? What software is it built with?	The main website is a password-protected WordPress site, although there are other platforms for training and HR-related content.
34	Does UDO have preferences for CMS options, programming languages, technical tools? Is there a preference for using Software as a service vs internal hosted solutions?	We are open to any recommendations that meet our requirements.
35	How large is the UDO web team? Do you anticipate maintaining these new applications in house or is supporting these applications a line item to be added to our proposed bid?	As mentioned in sections 3.5.2, 3.5.3 and 3.5.4, we would like the vendor to include these costs during and for 1 year after project launch, but we anticipate working with the vendor to plan for the post-implementation support of the new platforms.
36	What does success mean from these two projects? A certain amount of web traffic / new donations / repeating donations? How are these to be measured?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we want to create world-class digital experiences for our external constituents and staff members.
37	What languages besides English do these sites need to support?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
38	Can you explain your desire to have additional microsites listed in section 3.5.1? Does your organization need internal tooling, external sites, a combination of both?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups and initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
39	On p18 your RFP says an offer is due June 28th but the header of RFP on p5 says July 8th is the deadline for offers - which one is correct?	Addendum #2 addressed date change. Submission deadline is July 18th at 2:00PM
40	Is it possible that you will award different parts of the engagement to different firms, i.e., will you accept a proposal to do either the Donor Experience Platform or the Internal Knowledge Sharing Hub, but not both?	Explained in RFP.
41	For the Internal Knowledge Sharing Hub, are there requirements around technology, such as specific platforms that must be used?	We are open to any recommendations that meet our requirements.
42	How many pages/assets are on the current UDO knowledge sharing website?	There are 199 pages on our WordPress website (and many more linked assets), but we would expect that details about this scope would be identified in the discovery process with the selected vendor.

43	The requirements state "Includes Generative AI content tools." Can you provide further clarity to understand what the goal of this would be and the type of content you are looking to generate? Is this purely text or image content as well?	We were mainly thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor, as more tools may be identified by our team.
44	The requirements state "Content syndication– The solution: Can distribute and intake content or data feeds to or from other systems.". Are you able to articulate what systems are currently being used and/or what integrations are desired for content syndication.	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but mainly we are thinking about linking to external story-type content on other sites, events or schedule-type information.
45	The requirements state "Content personalization". Is there an existing Customer Data Platform or Personalization Engine being used by the University?	No.
46	Vendor must provide security compliance documentation (e.g., SOC 2 Type 2, NIST 800-*, ISO 27001, etc.) for the solution upon request by the University. We are planning to propose an open-source solution that would be hosted in the cloud. Our hosting provider does have all the requisite security compliance documentation. However, for completeness, for the open source solution itself, would we need to provide the same security compliance documentation?	We would expect that the answer would be yes.
47	Does the University currently have an ecommerce/donation platform that captures payment, etc. in place? If so, can you provide the name of the service being used today and whether or not the University intends to keep using it as part of the holistic digital strategy under this engagement.	Yes, Blackbaud Internet Solutions and Merchant Services. And yes, as of now we intend to keep that solution.
48	Is there a preference between off-the-shelf Software-As-A-Service (SaaS) solution or do you believe that a bespoke implementation would service the needs best?	We are open to any recommendations that meet our requirements.
49	What does UNC use for SSO authentication? e.g. AD, Okta, Shibboleth, CAS, etc.	Shibboleth
50	How is content intended to be translated? Manually by translators, or automatically by something like GTranslate?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
51	What system does your e-commerce processing website use? Does it have an API or other method for passing form data from the CMS?	Blackbaud Merchant Services and yes.
52	Integrations: While the CMS can be integrated with any of the examples given, each integration needs to be defined and built. Which integrations, if any, should be considered part of this scope? Please describe how they should work, e.g. what data they should pull and/or push, and how that data will be used.	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
53	Does the UDO have any brand guidelines (messaging and/or visual identity) defined distinct from the overarching university's brand guidelines? If not, will you be seeking any messaging development or copywriting as part of this engagement?	We do have distinct brand guidelines, but they are a subset of the university's brand guidelines. We would expect vendor support for messaging and copywriting as part of this project, especially during the build out of the new platforms.
54	For an engagement like this, we would typically include a comprehensive content strategy to guide usage of the new site as an engagement platform. May we include this in our proposal?	Yes, that would be welcome.
55	Understanding donor needs, interests, and engagement pathways feels critical to the success of this project. Does UDO have any alumni/donor research in hand to support this project? Would you welcome the inclusion of a user research scope within our proposal?	We have some research, but it is mostly dated at this point. We would welcome and expect user research as part of a proposal.
56	Will the desired new platforms wholly replace any existing relevant platforms?	Yes, our external user-facing websites and our internal knowledge sharing hub (intranet).
57	How closely will the high-level roadmap created with the other digital agency inform this work?	It is a starting point to inform the work but we are open to suggestions and guidance from the vendor.
58	How closely will the selected vendor be expected to work with fundraising partners across campus, or will those relationships and any relevant project dependencies be managed by UDO?	Campus partners will be key stakeholders in this work, especially as part of the discovery/planning phases. We would need to discuss how those relationships would be handled - we would expect the vendor to provide guidance on best practices from their experience.
59	Is a capital campaign in the university's near future? If so, how might this impact our work?	A comprehensive campaign is very likely to launch in 2027.
60	Do you desire the intranet to be protected by a login? Do you envision any direct connection between the intranet and the donor experience platform?	Yes, most likely, to both questions, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.

61	Do you envision the new donor experience platform hosting new content that does not currently exist on UDO or broader UNC domains (e.g. special feature stories, video features, etc.)	Yes.
62	Please describe the communications and marketing team at UDO that would be supporting these new platforms.	The marketing and communications department is responsible for monitoring the University Development Office/OneCarolina brand as well as marketing their value to various constituent audiences. The department provides marketing consultation, planning and execution services to the University's various schools and units in the deployment of development-related marketing programs. Currently there are 13 team members in design, digital, project management and content.
63	What is the budget for this project?	The University will not disclose any budget information.
64	Do you anticipate any dependencies with content or systems managed by other partners on campus (not UDO)? (e.g. news feeds, databases)	Yes
65	Can you clarify the "Affiliates" section of the RFP and provide more context?	That section is just explaining that we maintain a joint list of approved suppliers in the greater UNC System, of which those schools are members. It does not affect the proposal or imply any greater use case for the proposal.
66	Are there any CMS's you are leaning towards or do not want to explore? Any preferences?	We are open to any recommendations that meet our requirements.
67	Is there a desired timeline to complete the work? If so, how flexible is it?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
68	Are you looking for a full redesign effort for the implementation phase?	Yes.
69	Can you provide the high-level roadmap that was created by your digital strategy agency?	Content would be shared during the discovery process with the selected vendor.
70	Did your digital strategy agency identify features and functionality for both the donor experience platform and the internal knowledge sharing hub?	At a high level, yes, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
71	States that you currently use several constituent-facing web platforms. Can you provide references to the pages on the site that lead to confusion? Do these areas represent the funtionality that you are looking to provide?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
72	Can you provide examples of ways you are looking to engage and communicate with constituent audiences?	We engage with constituent audiences through multi-channel campaigns (email, social media, text messaging, print, advertising), but we envision our new donor experience platform as the hub for this engagement.
73	Will the donor experience portal be a logged in state, where messages can be personalized based on the constituents enagement with the university? For example, promoting where their donations have been used for scholarships or for improvements at the university.	A dynamic experience for a logged-in user is something that we would be interested in, but details about this scope would be identified in the discovery process with the selected vendor.
74	For the Internal knowledge sharing hub, are you looking for user generated content, or will the content be managed by the central UDO team?	The content is both developed and aggregated by the central team but will sometimes be developed by campus partners.
75	What is currently used for the ecommerce processing website?	Blackbaud Merchant Services
76	Does the ecommerce processing website have a RESTful API available for passing gift / donation amount?	Yes
77	Do donations have to be allocated to specific instiutions within the UDO network, or specific initiatives? (i.e. Are donations "restricted" in where funds can be used, based on donor guidance, or other variable?)	Donations are processed by UDO but can be directed to virtually any designation, which includes both designations to UDO and designations to other schools and units. The purpose of the gift designation solely dictates how the funds are used.
78	From a strategy standpoint, what framework or theories do you use, or plan to use in how you maximize donor behaviors? E.g. Applying choice theory, Behavior Design or other?	We don't have a one-size-fits-all strategy, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
79	Do you have a defined content strategy for the Internal Knowledge Sharing Hub/Intranet? Is this an area you are seeking guidance on?	We have an existing intranet site so we do have a content strategy, but would welcome guidance here.

80	As Campaign for Carolina evolves from a campaign to an ongoing commitment to connection, what change management initiatives are in place to enable the success of the tech and experience initiatives you are pursuing?	Our training and leadership teams will lead this initiative.
81	Do you have a customer journey and/or CX vision for the donor experience. Or the UDO experience more broadly?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
82	How many annual pageviews are there across the site today? (or estimated)	Approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
83	How many unique monthly visitors do you estimate for the sites?	Approximately 300,000 users across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
84	How many people are involved in the creation of content and campaigns?	This varies by the content and the campaign - larger initiatives can involve a large number of creators and approvers.
85	How many people need access to content created?	This varies by the content and the campaign - larger initiatives can involve a large number of creators and approvers.
86	What application does UNC use for Single Sign On?	Shibboleth
87	What are some example data feeds that you would want to ingest?	Mostly constituent data related to demographics, giving data, interests and affinities.
88	Can you provide the UNC and UDO brand and identity guidelines?	We would expect that details about this scope would be shared in the discovery process with the selected vendor, but we use a modified version of the UNC branding guidelines, which are available at identity.unc.edu.
89	Where do you store the data regarding for your donors today? Do you have a central data platform?	Blackbaud CRM
90	How many companies are responding to the RFP?	That is unknown. All suppliers are welcome to participate.
91	What is the budget for this project?	The University will not disclose any budget information.
92	Do you require a marketing plan?	No, although we would share our marketing plans with the vendor as part of the discovery process.
93	Are there any social media/blog management needed?	No.
94	Are there any preferences for CMS tools such as Wordpress, Drupal and Strapi?	We are open to any recommendations that meet our requirements.
95	What is the expected date of the website launch?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
96	Do you prefer the vendor to host the website? Can a vendor host the site on cloud platforms AWS & Azure?	We are open to any recommendations that meet our requirements.
97	Is Accessibility a requirement?	Yes, as mentioned in the RFP.
98	Are there any specific designs or features that the staff would like to see or include?	Outside of what is mentioned in the RFP, we would expect that details about this scope would be identified in the discovery process with the selected vendor.
99	Are there any specific third-party integrations that need to be included? Such as calendar reminders, etc?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
100	Should the website be multilingual?	Not sure, we would need to discuss details and how high of a priority this would be during the discovery process.
101	For the mass notification, should there be an option for multi-language? If so, what are the required languages?	Not sure, we would need to discuss details and how high of a priority this would be during the discovery process.

102	For maintaining & supporting the site, do you require 24/7 support on-call help desk?	We probably would not look to that level of support from the vendor, but we may need that from the platform provider.
103	How much traffic is expected from using the platform?	In the past year, we measured approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
104	How many users will be using the platform including University staff?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
105	Could you provide links to the existing constituent-facing web platforms in use and to the current internal UDO knowledge sharing website?	Our current internal knowledge sharing hub is behind a SSO login but has 199 pages (and many content assets). For our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
106	While we can learn more about this in discovery, what are some of the areas that you like about your current websites that you would like to see carried over and what areas need to be improved?	We described some of the issues in the RFP, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
107	Can you provide examples of highly functional page layouts that you admire or wish to replicate?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
108	Are there any branding guidelines or visual styles that must be reflected in these new websites?	We use a modified version of the UNC branding guidelines, which are available at identity.unc.edu.
109	What internal team resources are being devoted to this project? What will they be responsible for as a part of this engagement?	There will be many team members involved at various parts of the project, as this will impact many stakeholders in OneCarolina and the University Development Office. But we would expect a smaller core team involved on a day-to-day basis, with 1-2 project leads. We would look to vendor for guidance and project management support, however.
110	Do you have any preferred WCMS platforms? If so, could you specify which ones?	We are open to any recommendations that meet our requirements.
111	Could you provide more specifics on the types of user roles and the level of permission control required?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
112	What specific marketing and e-commerce platforms do you currently use or plan to integrate with?	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used).
113	Are there specific accessibility standards or guidelines you follow (e.g., WCAG 2.1)?	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
114	How many languages do you anticipate needing support, and what are the key languages?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
115	How many microsites/web portals do you anticipate needing, and what are the primary purposes of these microsites?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.

116	What is the current workflow management process for user roles (e.g., Author, Editor, Reviewer, Publisher)?	Our current process is not well as defined as we would like to establish with the new platforms. We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
117	Is your Single Sign-On (SSO) system compatible with SAML2?	Yes
118	Can you provide more details on the data warehouses you currently use?	We utilize SQL Server data warehouse and could provide more information during discovery.
119	Where is your website hosted? Are you looking for a vendor to provide hosting and maintenance services?	Our websites are hosted in a variety of ways, including on networks provided by UNC ITS and by other hosting providers. We are looking for the vendor to suggest hosting and provide maintenance services during the contract period.
120	How much did you spend on hosting and support in the past year?	The University will not disclose any budget information.
121	How many hours of training would be needed for your team?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
122	Do you have a budget defined for this project? If yes, can you disclose it?	The University will not disclose any budget information.
123	When are you expected to go into production with the new solution?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
124	Regarding licensing & implementation, do you need one contract vehicle, or can you sign multiple agreements for this RFP?	It is our preference to have one contract.
125	Are you able and willing to contract with both Servio Consulting for services & Salesforce for subscriptions?	We are open to any recommendations that meet our requirements and guidelines in the RFP.
126	How many users do you expect?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
127	Does this need to be fixed bid, or can it be hourly?	We would prefer fixed bid, with the ability to add hours if agreed upon.
128	If you can share, what is the budget assigned to this project?	The University will not disclose any budget information.
129	Integration: does UNC at Chapel Hill have an integration middleware tool in place? If so what is it?	No
130	It is mentioned that UDO partnered with a digital strategy agency to perform discovery. Can you share with us more information on what specific challenges in the current digital landscape were identified during the discovery phase? What are the major pain points or limitations of the current systems?	Other than what is discussed in the RFP, we would share content during the discovery process with the selected vendor.
131	What opportunities for improvement were highlighted?	Other than what is discussed in the RFP, we would share content during the discovery process with the selected vendor.
132	What feedback did you receive from users about the existing platforms?	Other than what is discussed in the RFP, we would share content during the discovery process with the selected vendor.
133	Have there been previous attempts to improve these systems? If so, what were the lessons learned?	We have built new websites, but not on the scale of what is proposed in the RFP.
134	What existing features or functionalities are beneficial and should be retained in the new platforms?	Other than what is discussed in the RFP, we would share content during the discovery process with the selected vendor.

135	What risks were identified during the roadmap project that could impact the success of the new platforms?	Other than what is discussed in the RFP, we would share content during the discovery process with the selected vendor.
136	How do the new platforms align with your strategic goals for fundraising and engagement?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
137	What strategic objectives will these platforms help you achieve?	Described in the referenced section of the RFP.
138	Can you describe the current systems and processes in place for donor management?	We utilize a Blackbaud CRM and have many teams involved in managing donors and data.
139	What are the primary goals and objectives of the Donor Experience Platform?	Described in the referenced section of the RFP.
140	What specific features are essential for enhancing user engagement on the donor experience platform?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
141	How do you envision the donor journey from initial contact to donation?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
142	What are the different user roles that will need access to the platform (e.g., donors, UDO staff, marketing teams)? What are their main responsibilities and activities?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
143	How do you envision a user journey from initial contact to donation?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
144	How personalized should the user experience be for different constituent audiences?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
145	Are there any tools needed for engaging and communicating with constituent audiences (e.g., email campaigns, social media integration, chat features)?	We utilize many tools for those roles and would expect to coordinate any integration needs as part of the discovery process with the vendor.
146	How would you like to ensure that resources are easily accessible whether users are in the office or on the road? Are any offline capabilities required?	Primarily through mobile optimization that ensures optimal performance and user experience on mobile devices, but other details about this scope would be identified in the discovery process with the selected vendor.
147	Can you describe the current systems and processes in place for internal knowledge sharing?	We are building out a more robust professional development and training team who will ultimately own these systems and processes, but developing these systems and processes will happen concurrently with this digital platform project. Currently there are a mixture of teams who own portions of this scope.
148	Can you provide some examples on how you imagine the main user flows within the new internal knowledge hub?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we have a wide array of teams, with a wide array of responsibilities, who would need to access and find content on this hub. This includes everyone from front-line fundraisers, to marketing teams, to data analysis and prospect management teams.
149	What educational content is considered for internal sharing?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
150	What are the different user roles that will need access to the platform? What are their main responsibilities and activities?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we have a wide array of teams, with a wide array of responsibilities, who would need to access and find content on this hub. This includes everyone from front-line fundraisers, to marketing teams, to data analysis and prospect management teams.
151	What communication channels should be integrated into the platform (e.g., email notifications, messaging)?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.

152	Can you provide more details on what is considered under "Internet Solutions" with which new platform should integrate with?	We outlined general systems in the RFP, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
153	Are there any documentation resources that are possible to share with us for more insights on the current processes, infrastructure and digital ecosystem?	We do have some resources from earlier strategy projects which would be shared with the selected vendor, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
154	Can the University elaborate on any specific pain points or operational challenges currently experienced with the existing digital platforms that the new Donor Experience Platform and Internal Knowledge Sharing Hub aim to resolve?	Our platforms are disconnected from each other (leading to issues in data tracking and with content creation), we do not have a very strong governance capability, we cannot serve up dynamic content and we cannot easily connect our engagement content to our fundraising opportunities.
155	For requirement 3.4.1(b), can you provide details on the expected volume and frequency of user activity logs and any specific audit capabilities required for the web platforms?	We haven't determined the exact number of users right now, or the number of associated logs and audit capabilities, so we would expect that details about this scope would be identified in the discovery process with the selected vendor.
156	Could the University specify any preferences or requirements for the hosting environment of the new web platforms?	We are open to any recommendations that meet our requirements.
157	Could the University clarify the accessibility compliance levels required for the platforms? Are there specific WCAG standards that need to be met?	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
158	What are the expected terms for ongoing maintenance and support after the platforms go live?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
159	Is there a predefined budget range for this project?	University will not disclose budget.
160	Could you let us know what the budget is for this work?	See above
161	Could we request an extension to the submission deadline?	No
162	Could you let us know if you have a local preference or are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?	We do not have preferences for location outside of what is described in the RFP.
163	Would you need any copywriting or content migration services?	We could use and would expect assistance in this area.
164	Would you need any original or stock videography or photography?	No
165	Would you require hosting, dns or ssl services?	We are open to any recommendations that meet our requirements - we expect the vendor to make a recommendation. If we utilize the hosting services provided by UNC-Chapel Hill ITS then we are restricted in what plug-ins or CMS we can use, so that is probably not the option that we would use.
166	Is there a CMS that you have a preference for over the other?	We are open to any recommendations that meet our requirements. Our existing websites utilize WordPress and Blackbaud Internet Solutions, although other CMS are used as well.
167	What CMS platform do you use currently?	Our existing websites utilize WordPress and Blackbaud Internet Solutions, although other CMS are used as well.
168	How much content do you currently have on your website?	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
169	Since Q&As will not be released until June 24th, would you consider extending the proposal deadline by a week?	We will post any updates to the RFP timeline on the official RFP site.

170	The RFP states that the contract shall have an initial term of 3 year(s) from the Effective Date (the "Initial Term"), unless terminated earlier in accordance with the terms and conditions of the contract. At the end of the Initial Term, the University shall have the option, at its sole discretion, to renew the contract on the same terms and conditions for up to 2 additional 1-year terms. Are annual adjustments to hourly rates allowed over the course of the contract and any renewals?	No price increase shall be permitted during the term of this agreement.
171	The RFP states that "we partnered with a digital strategy agency to create a high-level roadmap to guide future digital design and development priorities. This agency worked with UDO and fundraising partners across campus to lead discovery and conversations about the current state of our digital landscape and the challenges and opportunities that we face. Insights from this work highlighted the importance of improving internal knowledge management; better tracking donor interests; focusing on constituent engagement; and growing the donor pipeline." Could you please share the name of the agency you worked with? Could you please share whether or not this agency is capable of performing the work described n this RFP? Are they eligible to submit a proposal?	We are open to any vendors who can meet our requirements and will assess all submissions equally.
172	Could you please elaborate on the research/discovery that has already been conducted and any recommendations (not already in this RFP) that would inform the scope of the design and development of the two platforms described in this RFP?	We shared many of the key points in the RFP, but the full content would be shared during the discovery process with the selected vendor.
173	The RFP states: "We envision this as a central hub for engagement and communication with constituent audiences, while also serving the needs of UDO teams across marketing/communications, fundraising and stewardship roles. Currently we use several constituent-facing web platforms, leading to confusion, disconnected data and missed opportunities for connection. We want to bring together our engagement-focused content with a reimagined connection to funds/giving opportunities and donor portals, while capturing useful engagement data. We want to create a platform that will be able to grow with UDO's aspirations and capabilities." Could you please share the URLs to all of the constituent facing web platforms that currently exist? Do you envision that the new web platforms will replace these current web platforms? Could you please elaborate on the engagement focused content that you plan to bring together? Could you please elaborate on the "re-imagined connection to funds/giving opportunities and donor portals"? Do these donor portals already exist or would the creation of new donor portals be within the scope of this project?W hat platform do existing donor portals use? Could you please share access to, or screenshots of some examples of your current donor portals?	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor. The new platforms included in the RFP would replace these sites, for the most part, and for the "re-imagined connection to funds/giving opportunities and donor portals" section, we were mostly thinking about bringing together stories of impact and directly connecting/linking those to fundraising opportunities. In terms of donor portals, we have a Carolina Giving History site. Donors need to create a login. It's not visually appealing and it's pretty basic. It currently has total giving amount, a link to give again, payment list with ability to download receipts, gift recognition, recurring gift information and pledges. We'd like to have a more robust portal where donors can access their endowment reports, link to their volunteering information, or otherwise be able to personalize the content that is served to them while logged in.
174	How much copywriting and/or copyediting do you anticipate will be required for this project?	Not entirely sure if we could specify that right now, but there will undoubtedly be needs in this area.
175	Will this be performed by internal resources or do you expect your vendor to assist with this?	We could use and expect assistance in this area, but we do have content writers on our team.
176	What would the division of labor be between your team and your vendor's team?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, and will depend on the capabilities of the vendor.
177	Who will be responsible for placing content (content buildout) within your new CMS?	We were expecting a mix between the vendor and our team, but would expect that the vendor would build the majority of the content.

178	Do you anticipate any migration of current content into the new CMS? Do you anticipate that any of this content migration can be automated or scripted? Or will there be a complete content overhaul associated with this project?	Yes we anticipate migration of some content and it could possibly be automated in some way.
179	Do you have robust photo and video assets already?	Yes.
180	How often do you generate new content through photo and video shoots?	Often.
181	Do you align them with any specific content/marketing needs?	Yes, for the most part. Some is just created to create a library of content, but most is created for specific projects.
182	Do you have a sense for how many unique page types/templates or content types might be a part of the new web platform?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
183	Could you please share some guidance on the scope and scale of the new web platform so we offer informed budget recommendations around the design and development of your new web platform?	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
184	The RFP states: "We want to create an online hub that connects our internal fundraising teams to resources, training and dashboards that will make their work more efficient and effective. On our current internal UDO knowledge sharing website, information can be disorganized and content hard to find. We want to create an environment where our internal teams, from front-line fundraisers to back-end database teams, can share knowledge or ideas and grow collaboration. Content from news to gift proposal templates should be easy to find and accessible, whether working in the office or on the road." Could you please share access to or screen shots of your current UDO knowledge sharing website? How many end users do you anticipate having access to the new online hub?	We could share schreenshots during discovery. We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
185	How many back end users do you anticipate having access to the CMS for the new online hub?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
186	Could you please share more information about the scope and scale of the resources, training, and dashboards that will be on the new online hub?	Our current internal knowledge sharing hub has 199 pages and more associated content, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
187	Will the dashboards need to be created as a part of this project?	Probably not, but they would need to be displayed or integrated. We could discuss details during discovery with the vendor.
188	Do you have a sense for how many unique page types/templates or content types might be a part of the new online hub?	Our current internal knowledge sharing hub has 199 pages and more associated content, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
189	Can you please confirm whether or not "sensitive information" is in scope or not for this project? If so, could you specifically share what types of "sensitive information" is in scope? If so, which security measures listed in the RFP are relevant to the work your web partner will perform?	Since we would like to integrate with and display donor dashboards and information, including total giving amounts, receipts, gift recognition, recurring gift information, pledges, endowment reports, and link to their volunteering information, etc., it is most likely that the vendor will be dealing with sensitive information in this scope of work.

190	Do the security measures/requirements listed in the RFP apply to the CMS itself or will all "sensitive information" be contained within 3rd party software solutions that have already been approved by the University? (Blackbaud CRM, Salesforce Marketing Cloud, Data warehouses, Internet Solutions and Payment Services, etc.)	They may apply to the CMS since we would like to integrate with and display donor dashboards and information, including total giving amounts, receipts, gift recognition, recurring gift information, pledges, endowment reports, and link to their volunteering information, etc. So it is most likely that the vendor will be dealing with sensitive information in this scope of work.
191	Will your web agency (partner) be responsible for all of the security documentation and requirements listed in your RFP even if we are only integrating with existing platforms that have already been approved by the University?	Since we would like to integrate with and display donor dashboards and information, including total giving amounts, receipts, gift recognition, recurring gift information, pledges, endowment reports, and link to their volunteering information, etc., it is most likely that the vendor will be dealing with sensitive information in this scope of work.
192	Will a dedicated set of IP addresses be needed for allowlisting?	We coordinate any of these needs with the UNC ITS team.
193	What measures have you put in place to enforce security on your current site?	In addition to updating the CMS and plugins, security measures depend on which site is being discussed. For self-hosted WordPress sites we use a combination of firewalls and security systems from our hosting provider along with additional plug-in based login and firewall systems. For WordPress sites hosted by UNC ITS providers there is SSO login for users and measures put in place by the ITS team. Sites built in 'closed' CMS systems rely on security from the CMS provider.
194	Are you using a Web Application Firewall (WAF)? If "yes", please provide the name. f "no", will a WAF be desired to protect your websites?	For self-hosted WordPress sites we use a combination of firewalls and security systems from our hosting provider along with additional plug-in based login and firewall systems. For WordPress sites hosted by UNC ITS providers there is SSO login for users and measures put in place by the ITS team. Sites built in 'closed' CMS systems rely on security from the CMS provider. We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would listen to recommendations in this area.
195	Could please elaborate on how many individual user accounts might be needed?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
196	Could you please elaborate on your requirements for variable permissions and roles?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
197	How many different roles might be needed?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
198	Do you have a governance plan in mind for the new web platform?	Only in broad strokes, as we realize that we have an opportunity to improve in this area. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
199	Do you need your vendor to help establish a governance plan?	We would welcome input and expertise in this area.
200	Do you have a preferred CMS (or even a preference between open source vs. proprietary CMS's)?	We are open to any recommendations that meet our requirements.
201	Have you been a part of any CMS demos or evaluated any CMSs? If so, which systems are you considering?	We are always looking at potential options but we are open to any recommendations that meet our requirements.

202	Do we need to provide a CMS recommendation as part of our proposal or can we propose a CMS evaluation process as part of the project itself?	We are open to any recommendations that meet our requirements, which includes a CMS and expected costs, but your proposal could include options or an opportunity to evaluate those options.
203	Do you prefer to use the same CMS for both the Donor Experience Platform and the Internal Knowledge Sharing Hub?	Probably that would be preferable, but we are open to any recommendations that meet our requirements and willing to listen to recommendations from the vendor.
204	Will you be connecting your CMS(s) to any internal systems behind firewalls?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
205	Could you please list out any internal/external integrations and how they are implemented?	We would expect that details about this scope would be identified in the discovery process with the selected vendor. We have completed some discovery work in this area, which we would share during the discovery process as well, but we would expect more work to be done in this area.
206	Will future integrations be handled in a similar way?	Potentially, though we'd like to discuss this during the discovery process.
207	Will your partner be responsible for building and supporting these integrations?	We would imagine that the selected vendor will play a key role in building and supporting any integrations, along with our internal applications and development support and digital innovation teams.
208	Will internal resources help support the integration efforts and in what way?	We have applications and development support and digital innovation teams who would be the primary internal resources available to aid integration.
209	Could you please elaborate on how you want the CMS to integrate with UNC Single Sign On authentication?	We would want to configure SSO with Shibboleth for the internal site. For the external pages we would like to discuss this during the discovery phase.
210	Could you please describe what first party data you currently collect and what your future plans are for a first party data strategy as it relates to personalization?	We would like to use that first party data, if possible, to drive content personalization for users who are logged in to our platform, and to inform our future content strategy.
211	Do you currently use a CDP of any type?	No, we just have a CRM.
212	Can you please describe some use cases for the microsites/web portals you may need?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
213	Is the creation of any microsites/web portals a part of this project?	Yes, since we plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
214	What is your current ecommerce platform? Will this continue to be on the same platform?	Yes, our plan is to continue to use Blackbaud Merchant Services.
215	Is the creation of a new ecommerce website(s) part of this project?	Not directly, no, but we want to bring together our engagement-focused content with a reimagined connection to funds/giving opportunities and donor portals, while capturing useful engagement data.
216	Will you need to leverage CDN Geo Location data in your CMS application?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
217	If you move forward with a WordPress or Drupal based platform, do you plan on using UNC Chapel Hill's Pantheon Hosting environment?	We are open to any recommendations that meet our requirements and we are not set on a solution at this time.
218	Do we need to include hosting costs within our proposed budget estimate?	Yes, if the proposed solution has such costs, especially during and 1 year after the launch, and then an estimate of recurring costs.
219	Is there any existing audience/website user research available that might contribute to the success of this project?	Probably it is not that relevant, as any of our audience research is outdated, but we would expect that user reasearch would be included in vendor proposals.
220	Do you expect audience research to be a part of this project?	Yes

221	If so, could you please share more information about your audience segments and how we might engage with them (1 - 1 interviews, surveys, facilitated workshops, etc)?	We don't have people identified for testing right now, but we would discuss who would be involved during the discovery process, after selecting a vendor, and we would be open to best practices and suggestions in this area and try to accommodate them.
222	Will you be able to provide access to these audience segments and coordinate meeting times?	We would work with the vendor on this coordination and would discuss who would be involved during the discovery process.
223	How many average monthly unique visits (sessions in Google Analytics) does each site in scope receive?	Approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
224	Do you have a target launch date for the new site in mind?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
225	Do you have any additional deadlines?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
226	Has a budget been allocated for this project?	We do not disclose budget.
227	Because there are so many unknowns about desired functionality, 3rd party integrations and the scale and complexity of this project at this point in time – Would it be acceptable if our cost proposal has a range in cost at this stage of the process?	Yes, I suppose so. Whatever your team feels is appropriate.
228	Would you be open to a Discovery & Planning phase of work before scoping out the rest of the project?	Yes, we would expect and welcome that.
229	Do you have the existing campaign process well documented and can be shared with us as part of the Q&A?	We have internal teams and external consultants who are working on our comprehensive campaign strategy and we can share more detail during the discovery process with the selected vendor.
230	Is there a specific platform desired for the Intranet, for example SharePoint Online?	We are open to any recommendations that meet our requirements and we are not set on a solution at this time.
231	Has UNC conducted user research to inform and achieve its business and human centered design objectives.? If so, will this research be shared with bidders?	Probably it is not that relevant, as any of our audience research is outdated, but we would expect that user reasearch would be included in vendor proposals.
232	Are there specific personas identified to use this new system? If so, can you share with us?	Probably it is not that relevant, as any of our audience research is outdated, but we would expect that user reasearch would be included in vendor proposals.
233	What is the count of External/Internal users?	
234	How will you measure the success of this engagement?	Our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). As mentioned in the RFP, we want to bring together our engagement-focused content with a reimagined connection to funds/giving opportunities and donor portals, while capturing useful engagement data.
235	Have releases been laid out by representatives of end-users so that there is confidence that the MVP and subsequent releases will meet their needs in an order they would expect? Or is UNC expecting feature releases to be identified as part of discovery & design phases?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
236	Is there an existing database with information about services, standards, businesses and users? If so, what general categories of data are included in the database(s), what level of trust exists in the quality and completeness of that data? If not, to what extent does the scope of this project include collection of this data as the contractor designs and builds optimal databases to support the application?	We have some information in this area and that content would be shared during the discovery process with the selected vendor. As a higher ed institution we collect a wide variety of information on students, alumni, parents and donors as a result of their affiliation with the institution. We collect all types of demographic data, interest data, involvement with the institution, giving data. The platforms identified in the RFP would be interacting with and connecting with data from our CRM, powered by Blackbaud.
237	Do the systems you wish this solution to interface with have APIs available? If so, are they available for review? If not, please describe integration capabilities.	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.

238	Which screen readers should we support? VoiceOver (Mac) and NVDA (Windows) are two common ones.	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
239	What is UNC's current Single Sign On authentication service? Ie. Active Directory	Yes, we expect to provide more details on configuration during discovery, and are open to explore flat file solutions as opposed to API.
240	For the list of existing systems to be integrated, is this the complete list, or are there other existing systems that may need integrated into this solution?	There may be additional existing or new systems that may need to be integrated.
241	How frequently will portal content be updated, and who will be responsible for managing it?	The content will be both developed and aggregated by the central team but will sometimes will be developed by campus partners. Primarily our HR and training teams will be responsible for managing the content, and we want to make this new hub a much more vibrant and engaging space that staff will want to visit and find useful.
242	Are there specific content types that require special handling?	Possibly - some content may be restricted to certain users, because of what is in the content.
243	Can you elaborate on the Content Syndication needs? Are they specific existing systems that will need content updates based on inputs into the new system?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but mainly we are thinking about linking to external story-type content on other sites, events or schedule-type information.
244	How many languages are in scope? Please specify.	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
245	Can you provide examples of what Microsites will be needed?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
246	Does the department have a set of users with which there is a relationship in order to perform user research, or will identifying the key informants (users with whom we will design and build iteratively) be part of the scope of work?	We don't have people identified for testing right now, but we would discuss who would be involved during the discovery process, after selecting a vendor.
247	Can you expand on your existing user testing process? Do you have an existing user study format(s) and specific pass/fail guidelines?	We don't have people identified for testing right now, but we would discuss who would be involved during the discovery process, after selecting a vendor. We would also rely on vendor suggestion for user testing processes.
248	Can you expand on what level of training is expected? Is Change Management and adoption within the scope of this project (user guides, user demos, recorded training, end-user support during adoption windows per release, adoption barrier assessment, change management plans)?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
249	Do you expect the supplier to do all training delivery to end users or will there be resources available to assist?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
250	Are there specific change issues that have been identified in past projects?	Our main challenges are related to working within our decentralized fundraising teams - different teams have different goals and motivations and it can be difficult to gain support and buy-in for initiatives.
251	Do you have a Super User network? What is their role today? Are your Super Users managed to drive optimization and generate ideas for driving technology usage in your business?	Only informally, but we are working on the processes and teams to support implementing new technology and digital innovation.
252	Are there any tools leveraged for content development currently?	Only informally, but we are working on the processes and teams to support implementing new technology and digital innovation.
253	Are there tools leveraged for virtually delivery?	We do have training systems in place, and a training team who can help with distribution. But We would expect that details about this scope would be identified in the discovery process with the selected vendor.
254	Since there are Remedy Credits in place pertaining to the Software Availability Guarantee clause [39. (b)], would 36.Withholding and 37. Delay Penalties still be applicable to the project? If so, can you provide the percentage that would apply to each of these?	Need details

255	Can you expand on the vendor expatiations related to 'Customer Success Management?'	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
256	Does UNC expect this to be a fixed price or time and material contract?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
257	What is the preferred mode of engagement, (1) onsite, (2) remote-US, (3) remote offshore, or (4) hybrid? Does UNC allow for remote offshore?	We are open to any recommendations that meet our requirements, but we rely on our Purchasing team for guidance in this area.
258	What existing systems and platforms will the new web platforms need to integrate with? Are there any specific APIs or data exchange protocols we should be aware of?	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used).
259	What are the different user roles and permissions that need to be implemented in the new platforms?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
260	Can you provide more details on the preferred content management system (CMS) features you are looking for? Are there any specific CMS platforms you have in mind?	We are open to any recommendations that meet our requirements.
261	Is your team able to provide viewer access to the current intranet platform so we can assess the operation as it currently stands?	Content would be shared during the discovery process with the selected vendor. Our current internal knowledge sharing hub has 199 pages and is on WordPress.
262	As you describe this Internal Knowledge Sharing Hub, do you see that as starting from an existing platform (ex: Zoho, Salesforce, HubSpot) or starting from scratch	The main website is a password-protected WordPress site, although there are other platforms for training and HR-related content. We expect to bring many of those content resources to the new Internal Knowledge Sharing Hub, but we are open to any recommendations that meet our requirements.
263	Will the existing constituent-facing web platforms remain live with the launch of the Donor experience platform, or do you anticipate decommissioning any of them?	No, our goal is to replace them with the new platform, although we would discuss more during discovery with the selected vendor.
264	How much, if any, content from the existing constituent-facing web platforms do you anticipate utilizing on the new Donor experience platform?	We would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
265	For the Donor Experience Platform, would this gate rewards to certain people (ex: Donors of $10,000+ can see a certain page) or is this a platform for all donors? Would there be hand-selected groups that a donor member would be placed into	Not necessarily 'gate-keeping', but we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc). But they would also be able to access a more robust portal where donors can access their endowment reports, link to their volunteering information, etc.
266	For the Donor Experience Platform, would the platform itself actually handle transactions (ex: Credit Card Payment processing) or would that be handled elsewhere?	No, transactions would remain on our Blackbaud Internet Solutions and Merchant Services powered site.
267	Will the existing internal UDO knowledge-sharing site remain live when the new Internal knowledge-sharing hub launches, or do you anticipate decommissioning it?	No, our goal is to replace them with the new platform, although we would discuss more during discovery with the selected vendor.
268	How much, if any, content from the existing internal UDO knowledge-sharing site do you anticipate utilizing on the new Internal knowledge-sharing hub?	We would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in

		the discovery process with the selected vendor.
269	Can you elaborate on the specific pain points experienced with the current digital landscape and internal knowledge management system?	Our platforms are disconnected from each other (leading to issues in data tracking and with content creation), we do not have a very strong governance capability, we cannot serve up dynamic content and we cannot easily connect our engagement content to our fundraising opportunities.
270	What are the primary challenges with data integration and tracking donor interests in the current system?	Our platforms are disconnected from each other (leading to issues in data tracking and with content creation), we do not have a very strong governance capability, we cannot serve up dynamic content and we cannot easily connect our engagement content to our fundraising opportunities.
271	How do you plan to gather input from the various stakeholders involved, and what are their main concerns or requirements for the new platforms?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would expect to include input from a broad array of external (ie donors) and internal (ie staff) stakeholders through surveys, 1:1 sessions, group meetings, and other input as recommended by the selected vendor.
272	What are the specific security compliance requirements (e.g., SOC 2 Type 2, NIST 800-*, ISO 27001) that the solution must adhere to?	Described in the referenced section of the RFP.
273	Can you provide details on the accessibility standards that need to be met? Is there a specific VPAT or alternative compliance document required?	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
274	What are the expected traffic volumes, and how should the platform handle scalability to accommodate spikes in traffic?	Approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic, and we are open to recommendations from vendors.
275	What specific features or performance metrics are expected for mobile optimization?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
276	How many languages do you require content to be displayed in? Would this be a situation where content is human-entered, or is robot-generated translation acceptable?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
277	What level of detail is required for user activity logs, and what auditing capabilities are needed?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
278	Are all of the Software specifications expected on both the Donor experience platform and internal knowledge-sharing hub? If not, can you provide a breakdown of which specifications are unique to their respective sites?	We would expect that they are applicable to both platforms.
279	Can you expand on your goals and expectations with respect to Generative AI content tools for the Web CMS?	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do not currently use a dedicated toolset.
280	You've described content personalization influenced by data brokerage of anonymous user thumbprinting. Do you have a preexisting relationship with a data broker, and can you provide an example of what content would change as a result?	We don't have any preexisting relationships in this area and we would expect that details about this scope would be identified in the discovery process with the selected vendor. But primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc).
281	You've described Microsites. Would they have completely separate domain names as their CMS host, and would they have completely different design aesthetics?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups and initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we expect that they would exist within the same brand guidelines.

282	In the piece about Content Syndication, you've described that the site should take in content from other sources. Would that look like RSS feeds? Bespoke APIs? Do these endpoints already exist to consume?	Some probably do exist, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
283	How detailed should the content personalization be? Are there specific user data points that need to be tracked and utilized?	Primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc), but we are open to recommendations from the selected vendor.
284	What future technological advancements or systems should the platform be prepared to integrate with?	We are still developing our technology roadmap, so we don't have a complete answer here. One thing we are considering is a CRM transition in the next 4 years, which would likely be a Salesforce product.
285	After discovery, can you describe your preferred order of priority between the Donor Experience Platform and Knowledge Sharing Hub?	We would probably prefer to move forward with the donor experience platform first, although perhaps these projects could move forward concurrently. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
286	What specific data analytics and reporting capabilities are needed? Are there particular metrics or KPIs that should be tracked?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but our team goals are to be data-driven and responsive to engagement from our donors and constituents.
287	What level of training and ongoing support is expected from the vendor post-implementation?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
288	What are the key milestones and deadlines for this project, and how flexible is the timeline?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
289	Are there any budget constraints or expectations that should be taken into consideration?	University will not disclose budget information.
290	How will the success of the new platforms be measured? Are there specific goals or benchmarks that need to be achieved?	We don't have a one-size-fits-all strategy or set of metrics, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
291	How will user feedback be collected and incorporated into the platform development and improvement process?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would expect to include input from a broad array of external (ie donors) and internal (ie staff) stakeholders through surveys, 1:1 sessions, group meetings, and other input as recommended by the selected vendor.
292	How will you measure the success of this engagement? Do you have SMART goals in place that you can share?	We don't have a one-size-fits-all strategy or set of metrics, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). We would expect that details about this scope would be identified in the discovery process with the selected vendor.
293	How many users have accounts within the donor portal today?	We are not sure - we would expect that details about this scope would be identified in the discovery process with the selected vendor.
294	Is the user's account shared across the donor portal and ecommerce processing website?	Yes
295	For clarity, can you ellaborate on what you mean by "with a reimagined connection to funds/giving opportunities and donor portals".	As mentioned in the RFP, we want to bring together our engagement-focused content with a reimagined connection to funds/giving opportunities and donor portals, while capturing useful engagement data. In other words, establish dynamic connections between story content and funding opportunities, while capturing data that could add value to our understanding of specific constituents and/or our constituency as a whole.

#	Question	Response
296	To your knowledge, is this a platform limitation issue, or has user error and/or lack of governence slowly degraded the experience over time?	Probably a combination of many elements, including what you mentioned.
297	Phase2 works with many different platforms. As a stakeholder team, do you have a preferance toward any specific platforms, or types of platforms (example: open source or monlithic, headless vs more flexible, etc.)	We are open to any recommendations that meet our requirements.
298	Please provide information on the platforms/technologies leveraged for your present technology stack.	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used).
299	Please provide additional details on the platforms/technologies leveraged for your present marketing tools (Web Analytics, CSAT/VOC, Analytics Reporting and Dashboarding, CRM, Social, Careers, Events, Email, User Data, etc.)	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used).
300	Where is collected data stored? What, if any, user data is expected to be stored in the WCMS directly? As compared to be integrated and stored in another system, e.g. pushing user data to a CRM system.	Typically stored either in our data warehouse or where relevant our CRM (Blackbaud CRM). It is unlikely we would want to retain user data in the WCMS. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
301	What system is currently in use? Will the same SSO system be used for both web platforms?	Our platforms are primarily on WordPress, but other CMS platforms are used. And yes, presumably the same, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
302	Will all SSO users have the same role in the CMS? If not, will the SSO data contain role information or will roles be managed from the web platform itself?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but not all users would have the same roles.
303	Which systems will be connected to SSO?	Logins for backend site users but also for visitors to our knowledge sharing hub.
304	Will the web properties only need to act as SSO Service Providers?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we currently use Shibboleth for SSO.
305	Is site content already translated or should the response include translation services/capabilities?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
306	Which languages will need to be supported?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
307	How much of your content is translated?	Currently none, as far as we know.
308	What translation technology are you currently using? Are you using a paid translation service?	None.
309	What existing inbound data feeds exist?	We would work with our applications and development support team on any inbound data needs, including from our Blackbaud CRM or other platforms as identified in the discovery process with the selected vendor.
310	What existing outbound data feeds will need to be replicated?	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used). So we would expect that details about this scope would be identified in the discovery process with the selected vendor, as there could be interchanges between many of these platforms.
311	What other systems or sites does UNC plan to syndicate content across?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but mainly we are thinking about linking to external story-type content on other sites, events or schedule-type information.
312	What browsers and devices will be required for compatibility and testing?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, and also be based on the recommendation of the vendor.

313	How does UNC plan to leverage Generative AI?	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor, as we are actively investigating other potential use cases.
314	What kinds of content should be generated? Is it required that the Generative AI content tool adheres to your brand guidelines in tone and voice?	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor, and yes we would need to adhere to brand guidelines. But we would expect that details about this scope would be identified in the discovery process with the selected vendor, as we are actively investigating other potential use cases.
315	What is your anticipated workflow for editors leveraging AI generation, e.g. will AI assist with drafting content, or do you anticipate fully generating content with AI?	Presumably assist with content generation for now.
316	Can you describe a scenario for creating an additional microsite within the main site	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
317	Will these microsites have the same functional as the web platform sites?	Not necessarily.
318	Will microsites use the same design or will they need to support custom designs?	Possibly custom/modified designs, but within the same brand standards.
319	Will microsites require their own subdomains (testsite.unc.edu) or marketing urls (e.g. unc.edu/testsite)?	Probably both options would be used.
320	What system do you use for processing donations?	Blackbaud Merchant Services
321	Will any payment information be handled by the web platforms?	No
322	Will the web platforms need the ability to process payments themselves? If so, do you have an existing or preferred solution or payment gateway?	No, we will use our existing service, Blackbaud Merchant Services
323	Can you please describe the type of data that will be imported/exported between the systems listed within this section?	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used). So we would expect that details about this scope would be identified in the discovery process with the selected vendor, as there could be interchanges between many of these platforms.
324	What integration methods (e.g., REST, SOAP, Webhooks, etc.) are available for each system?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
325	Will payment processing be handled by Blackbaud or the web platforms?	Will be handled by Blackbaud Merchant Services
326	What type of data, if any, is coming from Marketing Cloud and what type, if any, is being fed back into MC?	All data from email interactions, including email jobs, opens, clicks etc. is exported from Marketing Cloud. Nearly all of our relevant constituent marketing data is fed back into MC.
327	Is the portal interface part of or integrated with any Journey within Marketing Cloud? e.g. if someone opens a page on the existing sites does that trigger something in Journey?	Not currently, but it's something we would ideally hope to accomplish with this new platform.
328	Will donations be accepted through the platform? If so, where do the funds need to go?	No
329	Are MC and Blackbaud currently synced? If so, what is the process for that sync?	Yes, via both flat file in SFTP and API calls.
330	Where is donor data managed? What is the source of truth for donor information?	Blackbaud CRM
331	What existing data warehouses are used in your organization?	SQL Server warehouse.
332	Will the web platforms needs to write to these systems or just have read-only access?	These platforms will not write to these systems and we may consider a flat file approach for the system to read data from our CRM

333	Which hosting providers are under consideration?	We are open to any recommendations that meet our requirements.
334	How many current page views per year?	Approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
335	How many current searches per year?	We don't track this currently.
336	How many entities do you currently have in your current cms?	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
337	How many static assets do you have current? Both number of assets and approximate disk space used to house them.	We don't track this currently.
338	What is the average traffic load to your site?	Depends on the site, but our 2 main external-facing sites are about 7,500 sessions per month, although the traffic could change as we more fully utilize these platforms in our marketing.
339	How often do traffic spikes occur? What is the traffic load during those spikes?	Not that often at a very high level, outside of our day of giving in March, where we drive 30,0000 sessions in one day.
340	What is your existing development workflow?	It depends on the project and environment - for our WordPress sites we generally deploy any changes to a staging environment for testing first.
341	How are new features being deployed to your hosting infrastructure?	It depends on the project and environment - for our WordPress sites we generally deploy any changes to a staging environment for testing first.
342	Are there any continuous integration tools in use?	Brightvine Import and Integration Engine
343	Do you have existing tools, benchmarks, or metrics for page load time and performance in your existing system?	We have tracked this through Google Analytics and through our hosting provider.
344	Are there any specific future systems you are looking for compatibility with?	We are still developing our technology roadmap, so we don't have a complete answer here. One thing we are considering is a CRM transition in the next 4 years, which would likely be a Salesforce product.
345	Can the RFP deadline be extended by 2 weeks? Two subject matter experts from our team have previously scheduled Time Off during the RFP schedule. (the week of July 4th is especially difficult) An extension would be greatly appreciated and will enable us to provide the best response possible to UNC as we will be able to include their expertise.	Any changes will be posted to the RFP on the official posting site.
346	Can you outline what you feel the impact is on UDO both short and long term by not addressing the challenge or set of issues driving this RFP?	Our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University), and we also want to be leaders in innovation in the higher ed fundraising space. All of this requires platforms that are forward-looking and flexible.
347	What are the key differentiators you're looking for in selecting a solution and an implementation partner?	We are open to any recommendations that meet our requirements, but we are looking for a team that wants to be a partner in our vision for innovative solutions in the digital space.
348	Is it expected that the selected vendor will support in redefining business process (if applicable)?	It would be good if the vendor had experience in and could share recommendations in this area.
349	What timing considerations are in place for this project? Are there any hard requirements on go-live dates? If so, what are these requirements?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
350	Are there any systems that have expiring contracts or licensing that we need to be aware of? Is the expiration date driving the timing of the project?	Not that we are aware of at this time.

351	Are there any other migrations/projects happening with technology that will conflict with this initiative? If so, how will UNC DO manage these parallel projects?	No, nothing that would conflict that we are aware of, but we are always assessing new technology solutions.
352	Are you looking to implement all requirements at once or in a phased approach?	We would look to the vendor to help craft a plan during the project discovery process, but a phased plan sounds appropriate.
353	Is there an anticipated budget for annual licensing for technology? In addition to licensing, Is there already a determined budget for implementation services?	University will not disclose budget.
354	How does the UNC DO finalize a decision on a solution like this?	Described in section 5.0 of the RFP.
355	How will you measure success of the engagement after its complete?	We don't have a one-size-fits-all strategy or set of metrics, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). We would expect that details about this scope would be identified in the discovery process with the selected vendor.
356	How many external users/donors are expected to use the donor experience platform monthly and annually?	We have not identified that goal specifically, so we would expect that details about this scope would be identified in the discovery process with the selected vendor. We measured approximately 300,000 users across all of our sites last year, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic, but that number would grow as we enter a new comprehensive campaign.
357	How many staff members will be supporting the donor experience platform?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
358	How many users are expected for the Internal knowledge sharing hub?	We have not identified that goal specifically, so we would expect that details about this scope would be identified in the discovery process with the selected vendor, but there are over 300 individuals in our staff directory and probably just as many additional development staff members across the university.
359	How many staff members will be supporting the internal knowledge sharing hub?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
360	What CMS tool is in use today? Does this tool need to be replaced, or would UNC like to continue using this tool?	As mentioned in the RFP, we utilize web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used). And we are open to any recommendations that meet our requirements.
361	What integration tool is being used today? Assuming it meets all requirements, will that tool be used for this project as well or are you exploring new integration tools as part of this RFP?	Brightvine Import and Integration Engine. We would need to discuss integration tools during discovery to determine if our existing solutions will work or not.
362	Which systems are expected to be integrated with the new solution at go-live?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
363	Which systems could be phased in over time?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
364	The Data Analysis and Reporting row calls out that the Data analytics and reporting capabilities can be customized to track specific engagement metrics important to UDO. What are the specific engagement metrics that are important to UDO?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but our team goals are to be data-driven and responsive to engagement from our donors and constituents, especially to their areas of interest.
365	User Experience: Does UDO have wireframes or mockups of what it would like the portals to look like? If so, can these be shared?	We have reviewed peer websites and platforms, but we would expect this type of planning to happen in the discovery phase with the vendor.
366	Can you share more about your giving site? Is this a custom build? If so, what's the underlying technology used to support it?	Our ecommerce site is powered by Blackbaud Merchant Services and Blackbaud Internet Solutions. It is a custom build.

367	What is being utilized for the payment processor?	Blackbaud Merchant Services
368	For user testing, does UNC already have ready participants to engage that are not employees of the institution, like an alumni board or students?	We don't have people identified for testing right now, but we would discuss who would be involved during the discovery process, after selecting a vendor.
369	The requirements are written as if to assume the software for the donor experience platform will be the same for the internal knowledge sharing hub. Is it expected that a single platform will support both, or is UNC open to leveraging different technologies to meet the desired goals?	We are open to any recommendations that meet our requirements.
370	What role will central IT have in this effort? What technology support will UNC provide during the project? What support plan is in place post implementation?	That will probably depend on the system, but our expectation is that they will have minimal involvement. We are currently working on the support plan post-implementation and would expect to discuss that during the discovery process.
371	There is mention of integration to data warehouses, can you share what is being used for your data warehousing? (AWE, Snowflake, etc)	Self hosted SQL Server warehouse
372	Will UNC need support in leveraging Marketing Cloud for their new donor exposed portal?	No
373	Can you provide examples of desired content personalization based on browser data and where these assets should be surfaced?	Primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc), but we are open to recommendations from the selected vendor.
374	Are there particular moments that you want to improve/optimize with content personalization (i.e. inspiring lapsed donor to renew their support, educating new graduate about ways to give)? Are there particular audiences that you want to prioritize (i.e. young alumni, parents)?	Primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc), but we are open to recommendations from the selected vendor.
375	What communications are currently being sent out of Salesforce Marketing Cloud?	The vast majority of email communications and some direct mail communications from the university are sent via SFMC.
376	What journeys and automations are leveraged currently in Salesforce Marketing Cloud?	Many different examples that we could share in discovery. Around 25 active daily journeys and over 100 automations.
377	Please clarify: Section 7.3 states the University may consider the Vendor's terms and conditions for licensing, as well as any exceptions. However, in 7.3.2, the University requires the RFP terms and conditions to take precedence over any Vendor agreement. Could you confirm in the case of those Vendors who currently have executed a negotiated agreement with the University, or are currently in negotiations, that the terms of the negotiated agreement are what will govern any future purchase of Vendor products/services despite what is stated in Section 7.3 of the RFP?	Pre-Negotiated Contracts will be taken into consideration on a case by case basis.
378	In 3.5.2 RFP seems to contemplate a partner-guided implementation, and there isn't a specific requirement to award a single contract for licenses and implementation, can you confirm?	Need details
379	How many companies have you invited to participate in this process?	We are open to any proposals that meet our requirements.
380	The RFP refers to a "vendor". Do you see this vendor as the technology company offering the core platforms, or the agency who designs and develops the platforms?	We are open to any recommendations that meet our requirements, so it could be either, although we imagine that an agency would be able to provide more guidance for a project such as this.
381	Do you seek to have multiple contracts with both an agency and a software vendor?	During the project period we would
382	Can you share a sense of the budget range available for the initial design and development of the 2 platforms, to help agencies develop a solution that best aligns with your expectations?	We do not disclose budget.
383	For platform/solution vendor costs/payment schedule, does UNC UDO wish to see a full package price? Or a yearly breakdown based on a recommended schedule/ramp of solution utilization?	Both would be useful for review.

384	Which Giving sites are being replaced by the new Donor Portal? Can you please list the URLs for domains that will be replaced by this new portal?	For our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
385	To what extent do you see this as a creative and strategic assignment? The cost table asks for a price for "software" and "maintenance", but "software customization" is optional. For a typical web platform project, we might see the Discovery, strategy and design as the key deliverable. Web platform design on this scale is typically an involved project that takes the better part of a year to complete. To what extent do you see agency strategic marketing and creative services as a part of this project? Why does the Cost Form exclude line items for services for the definition and design of OUD's bespoke platforms, but instead suggest this is software customization, (which might not be necessary)?	We do see this as both creative and strategic assignment and a development project, so we will revisit the cost form to clarify.
386	Can UNC UDO share historic numbers of monthly or annual page views/traffic on past websites during campaigns to help with sizing information?	Approximately 656,000 views and 300,000 users across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic, on a recent yearly basis.
387	What are expectations for monthly/annual page views/traffic for UNC UDO's upcoming campaign launch?	Not sure that we have an estimate for this, but we would discuss during the discovery process.
388	Are there any CDN/WAAF/WAAP requirements in scope? If applicable, how many domains would be in scope for any of these security offerings? If applicable, what would the total expected monthly bandwidth be for these domains in scope?	Yes, the University ITS and Information Security Office require high security standards for any web platforms, and we currently deploy managed Web Application Firewall, advanced DDOS Mitigation, Cloudflare CDN, and SSL on both our self-hosted and UNC ITS hosted websites. We need advanced security systems for both the donor experience platform and internal knowledge sharing hub, and we measured approximately 656,000 yearly views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
389	Content Migration - Do you foresee the agency moving sections of content from the current sites? If yes, please itemize sites and content types and quantities to be migrated.	Yes, but we would expect that details about this scope would be identified in the discovery process with the selected vendor. Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/
390	Governance Structure - Do you expect the agency to be involved in creating the governance policies for editorial practices and workflow for the new site?	Yes, guidance and recommendations in this are would be welcome and expected.
391	Which languages need to be supported for the multiple language capability? Is this for the entire Donor site, or just certain pages?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
392	How soon into leveraging a new solution would UNC UDO expect/desire to be pushing out personalized content?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
393	Can you further characterize the microsites you envision? Will they be part of the main Donor site (sub-sites with a robust landing page experience) or freestanding sites that are not connected to the main hub?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.

394	For microsites/web portals, how many sites/portals would likely be in scope?	We plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience. We would expect that details about this scope would be identified in the discovery process with the selected vendor.
395	We understand that all ecommerce transactions will happen on Blackbaud. Does UOD have a Blackbaud developer who will work with the agency to design and test website integration?	Yes
396	Is Blackbaud CRM set up to capture marketing attribution today?	Yes, though we may need to get more sophisticated in the future. We can build anything we need in BBCRM.
397	How is Salesforce Marketing Cloud being used, and how will it be used alongside Blackbaud? Can you please explain the division of goals and services for each platform?	Marketing Cloud is utilized for both one-time and triggered communications from schools/units across the university, including UDO. Blackbaud CRM is our system of record.
398	The RFP states the solution "Can distribute and intake content or data feeds to or from other systems." Is this as simple as RSS for News articles or something custom that can read/write to other Drupal sites? Developing compatibility with external systems is complex. Can you share examples or a vision of the syndication you envision?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but mainly we are thinking about linking to external story-type content on other sites, events or schedule-type information.
399	Content Syndication requirements- please elaborate on what systems UNC UDO anticipates data/content to be flowing in and out from?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but mainly we are thinking about linking to external story-type content on other sites, events or schedule-type information.
400	Can you further expand on your vision for the generative AI feature of the platform?	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do not currently use a dedicated toolset.
401	Are there any key dates or milestones that participating agencies should consider when developing schedules for these two platforms? Is there a preferred schedule or process for implementing updates and new features?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
402	Who are the primary stakeholders involved with each platform and how will they be involved in the discovery and development phases? Are there specific roles or expertise that will be provided or that you expect from our team? Will other agency partners—such as the digital strategy agency that developed this road map—be involved?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would expect to include input from a broad array of external (ie donors) and internal (ie staff) stakeholders through surveys, 1:1 sessions, group meetings, and other input as recommended by the selected vendor. There may be other agency partners involved in this process, but the digital strategy agency who developed the roadmap is not currently under contract.
403	What budget parameters can you share?	We do not disclose budget.
404	Can you clarify regarding what should be included in the offer/table of contents versus attached documents?	Refer to Section 6.3
405	What level of training, support and change management will be required post-launch?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
406	What are the main challenges and limitations faced with the current digital platforms used for donor engagement and internal knowledge sharing?	Our platforms are disconnected from each other (leading to issues in data tracking and with content creation), we do not have a very strong governance capability, we cannot serve up dynamic content and we cannot easily connect our engagement content to our fundraising opportunities.
407	What are the specific KPIs for each platform? How will the success of these platforms be measured?	We don't have a one-size-fits-all set of metrics, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). We would expect that details about this scope would be identified in the discovery process with the selected vendor.

408	When the discovery, design and development stages are complete, is any additional support required? (e.g., initial promotion, paid media, interlinking strategies with other web properties? Or just launch?)	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
409	Do you have any preferences for the web content management system to be employed? Are there any you will not want to use?	We are open to any recommendations that meet our requirements.
410	Can you provide more details on the existing systems (e.g., Blackbaud CRM, Salesforce Marketing Cloud) that the new platforms need to integrate with? Are there any specific API documentation or integration guidelines available?	Documentation on Blackbaud CRM and Salesforce Marketing Cloud can be found on their respective websites. We don't have any specific API documentation or integration guidelines to share at this time.
411	What performance data from existing donor pages will be available to a selected agency? How do you currently collect and utilize user data for content personalization? What are your expectations for the level of personalization on the new platforms?	We have Google Analytics data for our existing web platforms, plus data that is stored in our donor database that could be shared. We collect all types of demographic data, interest data, involvement with the institution, giving data, etc. We use some personalization within our emails, but not currently on our engagement web platforms. Primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc), but we are open to recommendations from the selected vendor.
412	What level of system administration will UDO require post launch?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
413	Would UDO like a selected agency to host and maintain software updates or transfer to a UDO hosting account?	We would probably look to the vendor to host and maintain updates during the contract period, but we would discuss the appropriate timing of a handoff of responsibilities in the discovery process.
414	How many users need access to the CMS? How many users should we assume for each platform?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
415	Is there a need to host additional affiliate websites? Will they need specialized access to the intranet?	No, those would not be within scope - this project is just for UNC-Chapel Hill.
416	Are there specific mobile devices or operating systems that the platforms need to prioritize?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, and we would look to the vendor to provide guidance in this area.
417	What specific security compliance documentation will be required from the selected agency?	Need details
418	How does UDO plan to handle the ISO risk assessment and DGOG review processes for the new web platforms?	These processes are led by central UNC ITS and their risk assessment team.
419	What are the specific ADA compliance requirements that the new web platforms must meet (e.g., WCAG 2.1, WCAG 2.2 AA)?	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
420	Can you provide examples of existing UNC web properties that meet these ADA compliance standards?	All UNC web properties should meet the standards, but there are always varying levels of compliance based on many factors (age of last update, etc). New web platforms are held to the highest standards as it is an important area of focus for our team and the University as a whole.
421	What existing systems and platforms (e.g., Blackbaud CRM, Salesforce Marketing Cloud, Google Analytics) need to be integrated with the new web platforms?	As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used). We would expect that details about this scope would be identified in the discovery process with the selected vendor.

422	Are there specific APIs or data synchronization protocols that need to be followed?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
423	How does UDO envision the scalability of the new platforms to accommodate future technological advancements or additional features?	This will be harder to predict as we are still working on our technology roadmap, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
424	Where is content currently being housed and does this content currently have a tagging system or structure?	Primarily our web content is hosted directly with the web CMS platform (although some is hosted within other cloud-based storage platforms) and our tagging system is not always consistent or thorough. This is an area where we would like to focus on and improve with the new platforms, so we would look to the vendor to suggest best practices or systems.
425	Which languages specifically will need to be supported?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
426	What level of Generative AI is needed? Full article creation or assist with articles, such as grammar enhancements.	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do not currently use a dedicated toolset.
427	Can you provide insights into the target user groups for both platforms? What are their specific needs and pain points that the new platforms should address?	We tried to outline broad needs and pain points in our problem statement, but for our Donor experience platform the primary user group is existing donors but also alumni, students, faculty, staff and other constituents connected to the impact that the UNC-Chapel Hill can and does make in the world. For our Internal knowledge sharing hub, our platform will serve diverse teams of fundraising professionals distributed across Carolina's campus, UDO is comprised of departments focused on annual giving, business intelligence, campaign management, foundation relations, donor relations, engagement and events, finance, human resources, infrastructure and technology, marketing and communications, principal gifts and prospect management, and research and analytics.
428	What user testing and validation processes does UDO expect during the design phase?	We would expect that details about this scope would be identified in the discovery process with the selected vendor and would look to the vendor to make recommendations in this area.
429	For any user testing performed with donors, will the agency be able to recruit from a list of current donors?	We don't have people identified for testing right now, but we would discuss who would be involved during the discovery process, after selecting a vendor.
430	What are the current URLs used internally and URLs used by donors?	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor. There are other platforms in use as well, which would be discussed during the discovery process with the selected vendor.
431	As a matter of understanding the scope of each of the two projects; can you share the number of pages you expect 'each' site to consist of? We are just trying to understand if this is something like 50, 100, or 1000 pages per site and not expecting a precise answer.	Our current internal knowledge sharing hub has 199 pages and, for our donor engagement platform, we would expect to include content from https://giving.unc.edu/, https://stories.unc.edu/, https://unclegacy.org/, https://give.unc.edu/ (although not the checkout portion of this site), https://acred.unc.edu/, https://carolinawomenlead.unc.edu/, https://carolinapride.unc.edu/, https://frie.unc.edu/, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
432	Internal knowledge sharing hub (Intranet): What type of dashboards are needed, and do they exist today?	We would probably not need to create dashboards, but they would need to be displayed or integrated. We could discuss details during discovery with the vendor.

433	Is ISO-27001 certification an absolute requirement? We can provide SOC 2 Type 2 certification. We do have policies relating to incident response, annual security training, overall Information Security Management policy, continuity of business and other internal policies that informs a framework and guidelines for establishing, implementing and managing an information security management system	Need details
434	What commercial platform/product is used today for UNC SSO? If the platform is not-commercial can you provide any additional information on the technical specifications.	Shiboleth
435	With respect to identifying unknown users, will there be multiple first-party data sources available to make this determination? Where will this information be sourced from?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, as we would need to determine the feasibility of this scope.
436	Can you please confirm front-end design is required for the donor experience and/or the intranet sites?	Yes
437	Will the design (Brand Guidelines) of both sites be similar or entirely different?	Should be similar, as we use a modified version of the UNC branding guidelines, which are available at identity.unc.edu.
438	Have you given consideration to a sitemap structure for one or both sites?	We have reviewed peer websites and platforms, but we would expect this type of planning to happen in the discovery phase with the vendor.
439	How many and which languages do you foresee needing?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
440	Do you have a preference towards a hosting provider? (Amazon AWS, Google Cloud or Azure)	We are open to any recommendations that meet our requirements.
441	How many and which languages do you foresee?	Not sure would need to discuss during Discovery.
442	How many sites are in scope for hosting / licensing? (Please provide # of top-level domains)	The 2 web platforms are identified in the RFP, but we anticipate needing microsites (on the donor experience platform) as we plan to launch a comprehensive campaign in 2027 and we support several donor groups or initiatives, all of which would need some form of custom digital experience.
443	How many users do you anticipate needing access to the CMS?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
444	Can you provide more details about the specific functionalities required for the Donor Experience Platform and the Internal Knowledge Sharing Hub? Are there any specific third-party systems or software that the new platforms need to integrate with?	Beyond what is described in the RFP, we would expect that details about this scope would be identified in the discovery process with the selected vendor. As mentioned in the RFP, we utilize Blackbaud CRM, Internet Solutions and Merchant Services, Salesforce Marketing Cloud, Google Analytics, Data warehouses and web platforms supporting crowdfunding, planned giving, events and others (primarily on WordPress, but other CMS platforms are used).
445	What specific security and compliance standards do we need to adhere to (e.g., SOC 2 Type 2, HIPAA)? Are there any existing technical documents or architecture diagrams that can help us understand your current infrastructure?	Security and compliance standards are described in the RFP and determined by our ITS team. We do have some technical documents and diagrams, which would be shared during the discovery process with the selected vendor.
446	Can you elaborate on the types of user roles and permissions that need to be managed within the platforms? How many users do you anticipate for each platform (Donor Experience Platform and Internal Knowledge Sharing Hub)?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.
447	What types of content and data will be managed on each platform, and what are the storage requirements? Are there any specific requirements for data migration from existing systems to the new platforms?	Basically we would like the ability to support any content type, but we would discuss how to store content in the discovery phase, or based on recommendations from the vendor. We would expect the vendor to assist with any data migration needs.

448	Can you provide a timeline for the project, including any key milestones or deadlines? What are your expectations for training and support for your team during and after the implementation?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline. We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
449	What level of customization do you anticipate needing for each platform?	We would like the platforms to be easily customizable via via low- or no-code WYSIWYG editing tools, but we would expect that details about this scope would be identified in the discovery process with the selected vendor.
450	Are there any future scalability requirements we should be aware of?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
451	Are there specific performance metrics or analytics that you would like to track on the platforms?	We don't have a one-size-fits-all metric strategy, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
452	How do you envision using data analytics to improve donor engagement and internal collaboration?	As mentioned in the RFP, we anticipate using data analytics and reporting capabilities that can be customized to track specific engagement metrics important to UDO and that will help inform business decisions for content development (including SEO), marketing, audience development, and pipeline development.
453	Is there a budget range or cap for this project that we should be aware of?	We do not disclose budget.
454	Are there any specific cost structures or pricing models you prefer?	We would like an overall contract cost structure, broken out by phases, with the ability to expand commitments with mutual agreement by both parties.
455	What are the key success criteria for this project? How will you measure the success of the new platforms?	We don't have a one-size-fits-all goal, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). Ultimately we are trying to grow engagement, measure that engagement, and use that knowledge to inform our future strategies (to grow our pipeline of engaged donors and educated staff).
456	Are there any specific pain points with your current systems that you want to ensure are addressed in the new platforms?	Our platforms are disconnected from each other (leading to issues in data tracking and with content creation), we do not have a very strong governance capability, we cannot serve up dynamic content and we cannot easily connect our engagement content to our fundraising opportunities.
457	are there any other stakeholders or departments that we should involve or consult with during the project?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would expect to include input from a broad array of external (ie donors) and internal (ie staff) stakeholders through surveys, 1:1 sessions, group meetings, and other input as recommended by the selected vendor.
458	Do you have any specific preferences or requirements for the look and feel (UI/UX) of the platforms?	We are open to any recommendations that meet our requirements and we would expect that details about this scope would be identified in the discovery process with the selected vendor.
459	What specific KPIs will measure the success of the Donor Experience Platform?	We don't have a one-size-fits-all goal, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University).
460	Are there any particular user engagement metrics or goals that the University aims to achieve with this platform?	We don't have a one-size-fits-all goal, but our team goals are to be data-driven and responsive to our donors and constituents (especially in regards to how they want to engage/be involved with the University). Ultimately we are trying to grow engagement, measure that engagement, and use that knowledge to inform our future strategies (to grow our pipeline of engaged donors and educated staff).
461	What are the main pain points and inefficiencies in the current internal knowledge sharing system that the new platform should address?	Our platforms are disconnected from each other (leading to issues in data tracking and with

		content creation), we do not have a very strong governance capability, and need better systems to connect fundraising teams, facilitate collaboration and ensure easy access to resources and information.
462	How does the University envision the ideal user experience for internal users accessing resources and training materials?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we would expect that information or resources would be easy to find and accessible from any device, as a baseline.
463	Could you elaborate on the types of content that the WCMS must support (e.g., videos, forms, articles)?	Basically we would like the ability to support any content type, but we would discuss how to store content in the discovery phase, or based on recommendations from the vendor.
464	What are the integration requirements with existing systems like Blackbaud CRM, Salesforce Marketing Cloud, and Google Analytics?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
465	Where are the data warehouses located? Is a VPN tunnel required to establish communication to/from these data warehouses?	Self hosted. Yes.
466	Are there any specific data privacy regulations or security standards beyond SOC 2 Type II, NIST 800-*, and ISO 27001 that the solution must comply with?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
467	What are the expectations for the solution's compliance with accessibility standards, particularly in terms of VPAT?	Beyond the VPAT mentioned in the RFP, our accessibility guidelines are governed by the University Digital Accessibility Office, digitalaccessibility.unc.edu
468	Can you provide an expected timeline for the discovery, design, development, and deployment phases?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
469	What are the critical milestones and deadlines that the University has set for this project?	Our current plan is to launch our next comprehensive fundraising campaign in fall of 2027, so we would expect that we would be able to move through discovery, planning, implementation and 1 year of post-implementation support before that date. Ideally we could implement a phased rollout of the platforms throughout that timeline.
470	What type of training and support will be required for University personnel post-implementation?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
471	Are there specific expectations for ongoing maintenance and support services?	We listed one year of support for these types of services post-implementation, so that our team has sufficient support and time to develop the internal teams (or identify the needed partners) to best utilize the new platforms. We would look to the vendor to suggest the appropriate level of support, whether that be a set amount of total hours or a monthly allotment.
472	What level of customization is required for the WCMS in terms of design, layout, and branding?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but generally we follow a modified version of University brand guidelines.
473	Are there any specific branding guidelines or templates that must be followed?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but generally we follow a modified version of University brand guidelines.
474	Are there any anticipated future enhancements or features that the University is considering?	We are still working on our future technology roadmap, but would like a platform that is extensible.
475	What is the budget allocated for this project, including initial implementation and ongoing maintenance?	We do not disclose budget.
476	Are there specific budget constraints or considerations for additional features or integrations?	We do not disclose budget.
477	What criteria will be used to evaluate the proposals, and what weight is given to each criterion (e.g., cost, technical capability, vendor experience)?	Refer to RFP.
478	Are there specific requirements for the format and content of the proposal submission?	Need details

#	Question	Answer
479	What are the primary user personas and use cases for the Donor Experience Platform and the Internal Knowledge Sharing Hub?	We tried to outline broad needs and pain points in our problem statement, but for our Donor experience platform the primary user group is existing donors but also alumni, students, faculty, staff and other constituents connected to the impact that the UNC-Chapel Hill can and does make in the world. For our Internal knowledge sharing hub, our platform will serve diverse teams of fundraising professionals distributed across Carolina's campus, UDO is comprised of departments focused on annual giving, business intelligence, campaign management, foundation relations, donor relations, engagement and events, finance, human resources, infrastructure and technology, marketing and communications, principal gifts and prospect management, and research and analytics.
480	Can you provide examples of current challenges and pain points users face with the existing platforms?	Instructions can be found in
481	Are there any existing accessibility audits or reports for current platforms that can be referenced?	Yes, and we regularly work our the University Digital Accessibility Office on assessments.
482	Are there any specific design elements or themes that should be emphasized to maintain brand consistency?	We would expect that details about this scope would be identified in the discovery process with the selected vendor, but we use a modified version of the UNC branding guidelines, which are available at identity.unc.edu.
483	What types of content will be managed and presented on the platforms, and how should they be visually organized?	Basically we would like the ability to support any content type, but we would discuss how to store content in the discovery phase, or based on recommendations from the vendor.
484	What are the expectations for mobile optimization, and are there any specific mobile devices or screen sizes that need to be prioritized?	Primarily to ensure optimal performance and user experience on mobile devices, but other details about this scope would be identified in the discovery process with the selected vendor.We would look to the vendor to provide guidance in this area.
485	What are the requirements for content personalization based on user data and preferences?	Primarily we would like users/donors who are logged-in would have a dynamic or personalized experience based on what we know about their experiences and giving history (share content or events related to that, etc), but we are open to recommendations from the selected vendor.
486	What are the key navigation structures and user flows that need to be incorporated into the design?	We would expect that details about this scope would be identified in the discovery process with the selected vendor.
487	What languages need to be supported by the platforms, and how should the design handle multilingual content?	Not sure, we would need to discuss how possible or high of a priority this would be during the discovery process.
488	What is the current UNC Single Sign On authentication provider?	Shibboleth
489	Is there a preferred generative AI tool? (e.g. ChatGPT)	We were thinking about tools which could be used for creating or refining text content, integrated into a content editor. But we would expect that details about this scope would be identified in the discovery process with the selected vendor. We do not currently use a dedicated toolset, although the University partners with Microsoft and their Copilot product.
490	How many unique users do you expect to log into the solution on average during a month (same user logging in multiple times during a month would only count once)?	We are not sure, but we had approximately 300,000 users across all of our sites in one year, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
491	How many anonymous page views do you expect this solution to receive in a year?	We are not sure, but we had approximately 656,000 views across all of our sites, including our ecommerce site (give.unc.edu), which accounts for 85% of that traffic.
492	How much data do you expect to be stored in the Web CMS for videos, documents, audio files, web content, etc. (in GB or TB)?	Basically we would like the ability to support any content type, but we would discuss how to store content in the discovery phase, or based on recommendations from the vendor. We would expect the vendor to assist with any data migration needs.
493	How many admin users may need to access the system?	We haven't determined the exact number of users right now, but we were imagining that there would be various levels of access for different types of users, from super users/administrators, to content creators, to reviewers, etc (some as granular as particular pages or types of content). The number of users at the top of the hierarchy would be much lower than creators or reviewers.

494	Do you have a preference for a WCMS?	We are open to any recommendations that meet our requirements.
495	Do you have a budget range specified for this contract?	We do not disclose budget.

Execute Addendum:

Vendor Name: _____

Authorized Signature: _____   Date: _____

Name and Title: _____

Email Address: _____