The University of North Carolina at Greensboro 840 Neal Street Greensboro, NC 27403	**ADDENDUM #1**
	RFP 69-2941 **CRM System Selection for University Advancement** **Q&A Addendum**
	Using Agency Name: UNC Greensboro
	Date: May 16th, 2025
	Commodity: 43232303 CRM Software

The following are answers to the written questions that were submitted via email on or before the submission deadline of May 7th, 2025 at 12:00PM ET. Any questions received after the deadline will not be included in this addendum. Should the University identify the need to offer additional information or clarification, a separate addendum will be issued via NC eVP.

A signed copy of **<u>this first page</u>** of the addendum must be returned with your bid package. Failure to submit a signed copy may result in rejection of your proposal. **<u>Please do not submit all 30 pages of this addendum.</u>**

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Signature Company Date

1.	Q.	Section 3.2, Page 8 – Total record count provided, no breakdown by type. Can you provide/share the counts of database records – Number of constituents by type (alumni, parent, corporations etc.)? Total constituent count (722,000) is provided, but no breakdown by type.
	A.	Though the initial constituent count of 722,000 was shared, UNCG doesn't anticipate transitioning all legacy record to the new CRM. The record estimates are closer to 500,000 with the type breakdown as follows: • 169,789 alumni • 2,909 Faculty/staff • 75,296 Parents • 13,373 Corporations • 616 Foundations • 238,000 approx. Friends/Other Total Approx 500,000
2.	Q.	Section 3.1, Page 6 – Flexibility in contact fields mentioned How many Address types are you managing? Flexibility in contact fields is discussed, but no specific count or categories of address types are shared.
	A.	We manage 5 types of addresses in the Advancement Office, and the University has 24 total address types (including the 5 that we manage).
3.	Q.	How many Name types are you managing? No mention of name types or categories (e.g., preferred, nickname, alias).
	A.	There are 17 different name types in Banner.

4.	Q.	Section 3.2, Page 8 – Total gift record count provided Can you provide counts by type for Gifts (Gifts, Pledges, Payments, Credits etc.)? Total gift count (609,000) is provided, but no breakdown by gift type.
	A.	468,696 gifts + 88,883 pledges, + 9,689 soft credits + 41,998 memo credit = 609,266 gift records
5.	Q.	Section 3.1, Page 6 – Flexibility in hard/soft crediting requested, but current rules not described Can you explain your gift crediting rules? (A couple gives $10K, is the gift shared between the couple or credited to only one person with soft credit to the spouse?) Desired flexibility is outlined for soft/hard credits, but current rules are not disclosed.
	A.	Currently we hard credit legal donors. For households there is logic built out within our reporting tools to report on soft-credits for spouses—for organizations we soft credit individuals manually.
6.	Q.	Are your gift crediting consistent throughout the database (or have you changed rules at any time that may need to be considered?) No historical consistency or rule changes are mentioned.
	A.	We have been consistent within historical periods, but we have two main “eras” of gift crediting. First is where we’d split credit households. The second is our current process of hard crediting legal donors and soft crediting individuals affiliated with a donating organization
7.	Q.	Describe how you are handling Premiums/Quid pro quos. Are they being handled consistently throughout the years on Banner? No mention of how these are tracked, credited, or handled in current systems.
	A.	They are being handled consistently within Banner. If a transaction comes through with a gift and a non-gift portion, the non-gift component is entered into a non-gift designation that is tied to a non-gift account code on the accounting side. If a transaction is completely non-gift that is not entered into the advancement module at all.
8.	Q.	Section 3.1, Page 6 – System should support gift society tracking, no current count provided Do you track gift societies within Banner and if so, how many? Tracking is listed as a functional requirement, but current practice or quantity is not discussed.
	A.	We have historically tracked 73 different societies over the years.
9.	Q.	Are there any business rules that are being revisited or revamped? If so, can you share what is under consideration? No mention of current business rule reviews or redesign efforts.
	A.	We have a desire to ensure our business processes align with best practices. The CRM will represent a major technological transformation throughout the division, and we would want to make sure that processes fully leverage the platform—meaning we are open to changing processes and rules to best take advantage of CRM functionality.
10.	Q.	Have you established a governance structure for CRM decision-making during the project? No governance model or decision-making process is described.
	A.	We have a generalized framework but are open to recommendations and best practices from the implementation partner we select.
11.	Q.	What is the availability of internal staff to participate in discovery, sprints, testing, training and data validation activities? No staffing capacity or internal resource availability is provided.

	A.	This implementation will be a high priority for the division. There will be a core team within operations that will be actively involved throughout the implementation process. Additional SMEs and teams will be called in when needed.
12.	Q.	Will you have a dedicated trainer participating in the implementation? No reference to internal training roles or FTE allocation.
	A.	No, there is no dedicated trainer on staff. Training services may be included in the future implementation partner RFP.
13.	Q.	Will you have a project manager assigned to the project? How much time will they be dedicated? No project management role or time allocation discussed.
	A.	Yes, there will be a dedicated PM for the implementation phase of the project, which will be available for the duration of the planned/prioritized project.
14.	Q.	Is the implementation part of a larger transformation effort (digital transformation, fundraising strategy, etc)? The need for modernization is mentioned, but not tied to a larger university transformation.
	A.	Pillar 3 of the university's new strategic plan, *Forward Together,* is ACHIEVE OPERATIONAL EXCELLENCE AND RESPONSIBLE STEWARDSHIP TO SUPPORT OUR MISSION. We see implementing a new system as supporting this pillar. University Advancement sees a new CRM as foundational to future operational excellence initiatives throughout our division.
15.	Q.	How will you define success for this CRM project beyond the go-live? Success metrics or outcomes post-go-live are not defined.
	A.	We are looking at improved outcomes in the following areas: strategic impact (e.g., higher volume and depth of data used in decision making), operational excellence (e.g., reduction in manual data processing; enhanced data quality audits; high adoption rate of the platform), resource optimization (e.g., ROI visibility in terms of CRM-driven improvements in donor retention increases, increased donor lifetime value, etc.), and adaptability (e.g., ability to create scalable processes within the platform, performance analytics capable of driving continuous improvement), .
16.	Q.	Section 3.2, Page 8 – Legacy systems described as limited, no redesign noted Are there known business processes that require redesign or optimization before or during implementation? General system limitations are described, but no specific processes are targeted for redesign.
	A.	See question 9.
17.	Q.	How familiar is your internal team with change management best practices? Change readiness or training maturity is not addressed.
	A.	See question 10.
18.	Q.	Section 3.2, Page 8 – Banner mentioned as current DB; other sources not referenced Is Banner the only data source or will migration from other sources need to be considered? Banner is described as the current system, but no mention of other sources needing migration.
	A.	Banner is the primary source of alumni and donor data. Banner also houses financial and student information. Additional connections or integrations with other tools, outlined on Pages 6-7 may be necessary to streamline the overall data strategy. UNCG welcomes vendors to submit additional recommendations for integrations or connectivity solutions.
19.	Q.	What is the technical proficiency level of the primary CRM implementation team? Team experience or capability details are not shared.

	A.	UNCG intends to select an implementation partner with the same care as selecting the CRM solution. To that end, the UNCG will issue an additional RFP to potential implementation partners in or about June of 2025, once finalist CRM vendors are selected. Vendors are welcome to respond to this RFP with the implementation partner(s) of their choice. However, UNCG reserves the right to select a different implementation partner.
20.	Q.	Are there deadlines tied to this project (i.e., campaign kickoff, software contract expirations etc.)? No hard deadlines or timing constraints are identified.
	A.	Our comprehensive *Light the Way* campaign concludes 12/31/25. Contracts should be finalized by that point. We are currently unaware of any other forces that would dictate deadlines outside of project management best practices.
21.	Q.	How risk-tolerant is your organization when it comes to adopting new processes or reengineering how things are done? Organizational change appetite is not discussed.
	A.	See question 9.
22.	Q.	Is there openness to embracing new functionality, streamlining processes and finding efficiencies? Implied as a goal, but no statement of organizational openness or alignment.
	A.	See question 9.
23.	Q.	How many documents need to be migrated? Document migration scope or volume is not addressed.
	A.	See response to Question 208.
24.	Q.	Are there any issues with data you might 'see' in Banner today but which Advancement is not the owner of the tables yet need to migrate? (i.e., financial aid tables) No mention of table ownership conflicts or cross-departmental data governance.
	A.	We have the support of our partners that manage data in other modules. We will work closely with them to identify data needs.
25.	Q.	Are there dedicated UNCWG-specific resources or vendors that currently own or manage technology separately from the University Advancement team? If yes, please clarify or share those relevant systems. Centralized vs. decentralized system ownership is not clarified.
	A.	We are the owners of all advancement data and advancement systems. The other systems listed on Page 9 of the RFP are university owned/management systems (i.e. Emma, eTeamSponsor, Scholarship Universe, FundDriver, etc.).
26.	Q.	Section 4.4, Page 14 – Azure Data Lake mentioned in toolset, no usage context Do you or other University entities leverage a data warehouse or a data lake? Azure Data Lake is mentioned in tool inventory, but no usage context for Advancement is provided.
	A.	Other University entities utilize a Data Lake currently. It is in scope for Advancement Data to also live in the Data Lake for ease of reporting, but there has not been a timeline established for that. Our desire is to ensure ease of integration once that timeline is established.
27.	Q.	We wanted to inquire if UNC would be amenable to using the existing agreement that's already in place between the UNC System and Salesforce for this RFP. This could streamline the process and ensure we are aligned with the existing terms and conditions

	A.	While the University is under no obligation to make an award under any existing UNC System Office agreements, UNCG recognizes that this could be advantageous and would accept such a proposal for evaluation, provided that the terms and conditions remain the same. As such, responsive vendors are encouraged to provide reference to the existing agreement within their proposal.
28.	Q.	5.2.1 Activities/Tasks, 19 Are there specific social media platforms (beyond LinkedIn and WhatsApp mentioned for logging) that require integrated communication or logging capabilities?
	A.	EverTrue pulls in Facebook data. We are hoping to have the ability to integrate with all of the popular social media platforms (e.g., X, Instagram, LinkedIn, etc.)
29.	Q.	5.2.2 Affiliations/Relationships, 19 Can UNCG provide examples of the most complex relationship types or organizational hierarchies that the system will need to represent visually?
	A.	Complex Relationship Types – an alum with a spouse and children who are alum has a family foundation where several of those family members serve on the board along with other non-family members that work for other organizations as their primary employment. Some board members have children that are alumni. We often see complex family dynamics, stepparents, half-siblings, divorcees, widows, etc. Technically we like to track the full picture relationship – employers, household occupants, important distant relatives that are of importance to UNCG. For organizations, tracking subsidiaries, branches, multiple locations, mergers and current and former employees can be quite challenging.
30.	Q.	5.2.2 Affiliations/Relationships, 19 What level of detail is required in the visual representations of relationships and affiliations?
	A.	UNCG would prefer to be easily able to visually identify relationship types (and multiple affiliations with the university, if applicable), reciprocal connections, and hierarchical views, as well as the ability to drill down. Some visual representation of engagement depth or quality would be desired.
31.	Q.	5.2.3 Constituent Management What is the expected role and specific use cases for AI in identifying potential constituents for verification during the decreasing process?
	A.	In an ideal state AI would be scanning public and proprietary data sources UNCG has access to proactively identify individuals who may be deceased and automatically flag records for review.
32.	Q.	5.2.3 Constituent Management To understand the "360-degree view," could you please detail the specific data sources and the university areas from which this data will be compiled? Furthermore, how is this diverse data expected to be integrated and presented within the view?
	A.	Constituent records are compiled of various modules in Banner: student, finance (for vendor data and advancement fund creation), advancement/alumni, human resources (for faculty/staff records), etc.
33.	Q.	5.2.3 Constituent Management What are the required criteria for users to self-subscribe to receive record modification notifications?
	A.	Desired state is for key staff members (team member, assigned development officer, etc.) to receive an email or system notification when a key piece of information is updated on a record, and/or the capability to audit and track what has been changed. For example, when addresses are changed, phone numbers are updated, or assignments are modified, the staff member would receive an email or system notification that the record was modified. Best case scenario would include enabling users to determine how frequently they

		want to receive updates and the type of updates that they are notified of (i.e. user can opt in to gift notifications but not to demographic update notifications).
34.	Q.	5.2.3 Constituent Management Could you provide specific use cases illustrating the need for multiple "current" contacts of the same type with dating and tagging? How should the system handle preferred contact methods in such scenarios?
	A.	A constituent who is CEO of a large corporation has one contact email for his development officer because he is working on a personal scholarship to the college he graduated from. That same donor works with the CFR Director on a gift from his business. That CFR director uses his work email to contact him. Both are preferred emails for the constituent, but their use is based on the team working with him for several purposes He has another email that he likes to receive general communication on, and he wants this to be his preferred email for non-major gift activity. Our overall desire is for the system to hold the date and user that created the record and the date, user, and field that was updated.
34.	Q.	5.2.4 Data Quality What specific features are required for data validation and deduplication tools, given the fragmented data environment What level of detail and retention period is required for data audits and historical data tracking capabilities?
	A.	Ideally, the CRM should list possible duplicates and give us the ability to merge the information on the records, identifying which data on each record should be kept. We follow University guidelines in regard to retention of data https://policy.uncg.edu/university_policies/records-retention/.
35.	Q.	5.2.4 Data Quality What specific features are required for data validation and deduplication tools, given the fragmented data environment What level of detail and retention period is required for data audits and historical data tracking capabilities?
	A.	See Question 34.
36.	Q.	5.2.5 Document Management Are there preferred shared storage solutions (e.g., SharePoint, OneDrive) that the CRM needs to integrate with for document linking?
	A.	SharePoint and OneDrive.
37.	Q.	5.2.5 Document Management What are the requirements for handling bulk uploads of documents, including the process for associating them with specified records?
	A.	See Question 23.
38.	Q.	5.2.6 Engagement What are the expected use cases and capabilities required for the peer-to-peer fundraising tools and tracking?
	A.	We currently have the ability to host endless peer-to-peer fundraising campaigns. We also have the ability to add on features like silent auctions, branded campaign landing pages, QR code check in with apps, badge and paddle creation, seating assignments and ticket management and much more. For peer-to-peer capabilities, we would need to track donations to the peer fundraiser, track progress to individual and overall campaign goals, social media links and posts, email drafting and much more.

39.	Q.	5.2.7 Fund Management What is the complexity of UNCG's fund structure, and what level of detail is required for designating, managing, and reporting on gift funds?
	A.	Each gift should be able to be attributed to at least one designation. Designations should have the ability to list attributes (like associated campaign pillar, undergraduate awarding vs graduate awarding, etc.), Banner fund numbers, designation codes/IDs, fund type, VSE, college and department codes, activity status, and start and end dates.
40.	Q.	5.2.8 Gift Administration Can UNCG provide examples or rules for how soft credit and fundraiser credit should be managed? What is the anticipated volume and complexity of planned and property gifts that require specific fields and page layouts for processing and administration? Please provide a typical "complex" gift scenario
	A.	Matching Gifts – for gifts received directly from the employer, soft credit the employee. If the matching gift comes from a third-party DAF, soft credit both the employer and the employee. Third Party and DAF Gifts - Hard credit goes to the Third Party/DAF. Soft credit to the donor constituent. Spouse Gifts – soft credit should be applied to the active, living spouses for all gifts and pledge payments received. This is a change from our current business practices. Per Case Guidelines: If a married couple or legal partners, both of whom are constituents, make a gift, hard-credit the legal donor with the full amount, regardless of which constituent type the person is. The person who receives soft credit as a donor also gets soft credit for the full dollar amount. If an organization such as a DAF, family foundation, or company makes a gift that is soft-credited to one person in a legal partnership or marriage, the other person in the partnership ALSO gets soft credit as a donor, and that person is also soft credited for the full dollar amount. Pledge Payments - for pledge payments received from a third party, soft credit should still apply to the third party (and spouse as needed). Fundraiser Credit should be allowed for multiple fundraisers. Our current practices do not support this.
41.	Q.	5.2.9 Integrations Beyond WebFOCUS, Power BI, and Banner, which third-party systems currently in use or under consideration require robust and reliable integration options? (A prioritized list would be helpful).
	A.	UNCG defers to the vendor for integration possibilities for their product.
42.	Q.	5.2.9 Integrations What is the expected frequency and volume of data transfer required from Banner and other campus systems (student, parent, financial)?
	A.	At a minimum a nightly transfer to the finance module is required. Student and parent data should be able to retrieved as needed on a regular cadence.
43.	Q.	5.2.9 Integrations Are there preferred vendors or types of services for wealth ratings and demographic data append options?
	A.	UNCG prefers to use vendors we have worked with in the past or the UNC system has a convenience contact with, some examples are: AlumniFinder, DonorSearch, iWave, LexisNexis. That said UNCG is open to other vendors that may provide more value in a new platform.
44.	Q.	5.2.10 Management of Projects, Events, Campaigns, and Volunteers

		What is the typical volume and complexity of events, campaigns, and volunteer opportunities managed annually?
	A.	See responses to questions 196 and 200.
45.	Q.	5.2.10 Management of Projects, Events, Campaigns, and Volunteers How is geo-coding intended to be used for travel, event planning, volunteer recruitment, and donor assignments?
	A.	We want to ensure we are maximizing ROI and would like to use geo-coding data to assist us in analyzing regions where we can maximize the effect of travel, event planning, volunteer recruitment, and donor assignments.
46.	Q.	5.2.10 Management of Projects, Events, Campaigns, and Volunteers What specific details and level of customization are required for tracking membership benefit details and deliverables?
	A.	UNCG is currently reimagining our membership programs, so we are not able to provide specifics. However, we desire the ability to view membership levels, associated benefits, and benefit delivery status with customizable fields and workflows. We would like users to be able to view benefit history and fulfillment status at-a-glance. Custom dashboards and filters should support targeted engagement and operational efficiency.
47.	Q.	5.2.10 Management of Projects, Events, Campaigns, and Volunteers Does UNCG have a need to manage a mentoring program?
	A.	Yes, we desire the ability to manage a mentorship program.
48.	Q.	5.2.11 Portfolio Management Can UNCG describe the structure and typical team roles within the university-wide constituent relationship management team? What format or level of detail is required for tracking constituent relationship management team communications on records? What are the key stages or steps in your organization's moves management process that need to be established and visually tracked within donor records?
	A.	The Advancement Team currently has 3 members on its data team that directly work with our systems. There is a Director who handles advanced reporting and visualization needs, a Data Manager who provides most of our reporting to the team and offers technical support for electronics, and lastly a Bio Coordinator who is responsible for the majority of our data entry and record updates. The data team reports to the AVC of Advancement Operations. We currently enter contact reports into banner when communication between the team needs to be tracked. For all other needs, we use Teams or EverTrue comments to communicate amongst the team. We track the following stages in our moves management: Cultivation Pre-Solicitation – Ask 13-24 months away Solicitation Strategy – ask 0-12 months away Ask Made Verbal Commitment/Documentation needed Gift Made Stewardship Denied Ask Estate Documentation Not possible

49.	Q.	5.2.12 Process Optimization What types of approval or other staged processes need to be defined and tracked within the system?
	A.	See question 48 Approval processes may also be needed for demographic updates (the assigned development officer needs to approve all address changes before they are finalized), escalated requests (the ability to send a task up the protocol chain), and solicitor assignments/moves need to be tracked at the time of assignment, reassignment and stage progression along with the staff member that made the move. The ability to track prospect research requests is also desired.
50.	Q.	5.2.12 Process Optimization Share examples on how to track time in approval, fundraising, and other defined stages.
	A.	UNCG defers to the vendor to showcase how their platform tracks time in these stages.
51.	Q.	5.2.13 Prospect Management What specific types of predictive modeling capabilities (e.g., propensity to give, likelihood to volunteer, major gift capacity) are needed?
	A.	We do not have a mature predictive modeling capability yet and wish to achieve the capabilities that a university of our size and scale should be utilizing. We defer to the vendor for recommendations on how to achieve that.
52.	Q.	5.2.13 Prospect Management How are these predictive models developed 4 and validated? What data sources are used?
	A.	See response to Question 51.
53.	Q.	5.2.13 Prospect Management Are there opportunities to integrate custom predictive models developed outside the system?
	A.	UNCG is not opposed to have the ability to integrate custom models developed outside the system.
54.	Q.	5.2.13 Prospect Management What tools are available for users to analyze their assigned prospects or the overall prospect pool?
	A.	We currently use iWave, LexisNexis, and EverTrue to evaluate the assigned prospects and prospect pools.
55.	Q.	5.2.13 Prospect Management Are there tools to identify potential new prospects based on defined profiles or external data sources?
	A.	See question 54.
56.	Q.	5.2.13 Prospect Management What standard rating scales or categories are available for prospects (e.g., giving capacity, inclination, engagement level)?
	A.	We currently track giving capacity and engagement in Banner.

57.	Q.	5.2.14 Reporting, Analytics, and AI Can UNCG elaborate on the expected use cases and desired outcomes for leveraging AI to spot hidden potential, trends, and opportunities?
	A.	See responses to questions 14 and 15. UNCG is looking for AI to help augment current staffing.
58.	Q.	5.2.14 Reporting, Analytics, and AI What specific data visualization capabilities are most important to the Advancement team?
	A.	UNCG would like the ability to design dashboards that show fundraising metrics that we are accustomed to seeing in Banner, includes year-over-year, giving and other campaign reports. We also have designed prospect development dashboards that show us closed proposals and portfolio, giving, and other metrics for the development team. Through Evertrue, we have access to various clarity dashboards that show us information such as task completion system, activity, usage, and time spent in stages. See also question 124.
59.	Q.	5.2.15 Security Are there specific security standards or compliance requirements UNCG adheres to beyond completing the HECVAT?
	A.	Vendors should provide any of the following that are applicable: * Privacy Policy * Terms of Service * Service Level Agreement * Service Organization Controls SOC2 Type 2 * Service Organization Controls SOC3 * HITRUST * International Standards of Assurance Engagements ISAE 3402 * ISO/IEC 27001/27017 * StateRamp * FedRamp * HECVAT (Higher Education Community Vendor Assessment Toolkit) * Family Educational Rights and Privacy Act (FERPA) Agreement * Health Insurance Portability and Accountability Act (HIPAA) Business Associate Agreement (BAA) * Payment Card Industry Data Security Standard (PCI DSS) Attestation of Compliance (AOC) or Report on Compliance (ROC)
60.	Q.	5.2.16 Specialized Features What calendaring systems do your users currently rely on (e.g., Outlook Calendar, Google Calendar)?
	A.	UNCG is a Microsoft 365 campus and rely on Outlook for calendaring.
61.	Q.	5.2.16 Specialized Features What level of functionality is expected in the mobile application, and are there specific requirements (e.g., offline access)?

	A.	The expectation is that gift officers are able to access constituent data while traveling and are able to conduct business within the mobile app (e.g., enter contact reports, enter proposals, change prospect staging, etc.). We do hope for parity in functionality between an iOS app and an Android app.
62.	Q.	5.2.16 Specialized Features What mobile operating systems (iOS, Android) would the app need to support?
	A.	iOS and Android would need to be supported.
63.	Q.	5.2.17 System What is the anticipated volume and complexity of data involved in bulk upload, update, and delete operations?
	A.	For day-to-day operations volume would be in the hundreds to thousands. For bulk address appends and similar situations we would anticipate volume in the tens to hundreds of thousands.
64.	Q.	Of the 50 staff, will all need access to the CRM? If you have a breakdown of staff type, that can help identify license and access needs of your staff.
	A.	Yes, all university advancement staff will need access to the CRM. Here is a rough estimate by team: VC Office: 2; Advancement Operations 12; Development: 18; Alumni Engagement & Advancement Communications: 14; Philanthropic Engagement: 10
65.	Q.	Do you need a Day of Giving Solution as part of this offering to replace GiveCampus, Imods/Encompass and Gravity?
	A.	See question 150.
66.	Q.	On average, what percentage of your donations are you bringing in via online donation? Please share annual totals for online giving.
	A.	Approximately 59% of our number of gifts come in via online donation. Totals each year are typically under $2M.
67.	Q.	Would you like an external portal for giving and/or alumni as part of this offering?
	A.	See question 150.
68.	Q.	Are there specific expectations for the use of AI, such as predictive analytics for donor engagement or automated workflows for gift processing (other than this expressed need "Leverage AI to spot hidden potential through identification of such things as trends, giving and research opportunities, board membership potential, and engagement needs.")
	A.	See question 57
69.	Q.	Could you outline the specific phases expected during the implementation, and is there flexibility in adjusting these phases based on the vendor’s recommendations?
	A.	UNCG would expect that a typical CRM implementation project include the following phases: Project Initiation and Planning, Functional Designs and Build, Data Integration and Migration, Testing (End to End and UAT), Training, Change Management, Go-Live, Hypercare Support. UNCG is open to vendor recommendations.

70.	Q.	What are the expectations regarding data quality improvements during migration from Banner to the new CRM? Are there specific pain points to address?
	A.	See question 34.
71.	Q.	You are currently using Tableau, WebFocus and PowerBI. Can you explain (broadly) which types of analytics and reports are in each platform currently? Is your goal to use a single platform for all analytics & reporting?
	A.	We will maintain usage of Webfocus and PowerBI based on university standards for reporting. See question 58
72.	Q.	Beyond donor management, what are the key goals for the CRM system in supporting future campaigns, particularly after the "Light the Way" campaign?
	A.	See response to Question 15.
73.	Q.	Could you elaborate on how volunteer engagement and event tracking are prioritized within the CRM functionalities?
	A.	When volunteers sign up for an opportunity, we track those in the activity form in Banner. Likewise, event participation is also tracked as an activity. We do not have the ability, currently, to save event details like dates and description of the event or event costs. Because we use the activity form, we have to enter a new “activity record” for each event status (registered, attended).
74.	Q.	What software do you use for your Data Warehouse? Is your DW only for Advancement or do you share it with the rest of UNCG?
	A.	See question 26
75.	Q.	Of the 722,000 constituent records, how many of these are email-able contacts? What is your typical email audience size? We need to know the total possible number of contacts that you are emailing
	A.	See question 176
76.	Q.	Do you have a rough estimate of the quantity of emails you send a year? (i.e., you send 1000 emails to 1000 constituents= 1,000,000 M messages a year).
	A.	See questions 155, 160, and 195.
77.	Q.	How does your advancement marketing team work with campus partners and other centralized marketing teams on campus?
	A.	Our advancement communications team is a dedicated team housed within university advancement that collaborates closely with our centralized communications teams. They also work with communications or comms-adjacent roles embedded in academic and administrative units to ensure common messaging to our alumni, donors, and friends.
78.	Q.	How are you currently tracking communication preferences for constituents?
	A.	We currently utilize mail codes within Banner to track “Do not…” preferences
79.	Q.	Are you looking to replace both EMMA and Mailchimp and consolidate to one marketing automation solution? How are teams currently choosing to use these platforms for various needs?

	A.	See question 99.
80.	Q.	Please describe your current marketing and communications teams. How are your teams organized and how do you divide tasks around your various efforts?
	A.	See question 77.
81.	Q.	Do you have a budget for this project that you are looking to stay within? Has the budget been approved or will it need to be approved by your board?
	A.	UNCG has a fixed budget for this project.
82.	Q.	Are you missing any sources of data when creating your marketing campaigns to use for personalization or segmentation? How difficult is it to integrate this data currently?
	A.	It's not necessarily that our sources are missing per se — more that a lot of the info we need comes from disparate sources that don't talk to one another. Or that our overlays (EverTrue, UA Banner) give us some information but not all, and thus we spend a lot of time doing manual data integration for segmentation and data analysis purposes.
83.	Q.	Are you interested in sending both 1 to many SMS messages and 1 to 1 SMS messages? How many SMS messages do you send annually?
	A.	Yes to both. We currently have around 138,000 contacts in Mongoose, but we have only been using the platform since January, so it's hard to say what our annual send would be. We have averaged around 3,700 messages/2,100 contacts per month since then.
84.	Q.	Can you elaborate on your top strategic priorities for the next 3-5 years? How do you envision the CRM solution specifically supporting those goals?
	A.	See Question 14 and 15.
85.	Q.	What specific metrics or outcomes will you use to measure the success of the new CRM implementation?
	A.	See Question 15.
86.	Q.	Among the extensive functional and technical requirements outlined, can you highlight the top 3-5 priorities you consider most critical?
	A.	Please see responses to questions 14 and 15.
87.	Q.	Can you share specific limitations encountered integrating current solutions that the new CRM must resolve?
	A.	Outside of the integration between Banner Advancement and Anthology's Encompass product virtually all other integrations consist of flat file transfers between the two platforms. Ingesting data into Banner Advancement in this format is typically time consuming. It is also typically not automated, requiring manual intervention to have data flow.
88.	Q.	In general terms, what is the total budget the university is anticipating for this project?
	A.	See question 164

89.	Q.	In general terms, is there a preferred CRM the university is considering over others, at this point?
	A.	See question 168.
90.	Q.	1.4 TECHNOLOGY ECOSYSTEM Are there any current development methodologies in use such as Scrum, Kanban, or Agile?
	A.	ITS utilizes a variety of development methodologies, depending on the needs of the particular work item. Most commonly, we use a Waterfall approach for larger/higher stakes efforts and Agile for smaller/iterative work.
91.	Q.	1.4 TECHNOLOGY ECOSYSTEM What are the current technical capabilities of the day-to-day staff? Are there currently internal software developers, sysadmins, and others maintaining the current state?
	A.	ITS and the Advancement Operations data team has our technical expertise. The internal team has familiarity with technical terms and processes but serve as Advancement SMEs.
92.	Q.	1.4 TECHNOLOGY ECOSYSTEM Is there a current project management system in use such as Jira?
	A.	The default option for users on campus is to remain in the enterprise productivity suite – MS Planner. There is a provision to upgrade to Planner Premium, and if there is a justifiable need, we work with our campus partners to implement a non-Microsoft option. Additionally, ITS uses ServiceNow internally, but it has not been extended to wider campus use.
93.	Q.	4.1 HUB PARTICIPATION Can a vendor express interest in subcontracting only? If so, will there be a list of primary vendors listed?
	A.	Any prospective vendor interested in subcontracting will need to collaborate directly with the primary bidder to secure any work, unless already specified in the primary's proposal. A tabulation of all responses received will be posted to the NC eVP portal after the bid opening, and made available as a matter of public record.
94.	Q.	4.1 HUB PARTICIPATION Does a subcontractor-only vendor need to submit a separate proposal?
	A.	Subcontractor-only vendors do not need to submit a separate proposal. Rather the primary bidder should indicate any subcontractors to be used in the period of performance.
95.	Q.	4.3 DELIVERY What KPIs or outcomes will indicate a successful transformation?
	A.	See questions 14 and 15.
96.	Q.	1.3 CURRENT FUNDRAISING REQUIREMENT Could you provide more detail on the Advancement team's long-term vision for data and engagement beyond the campaign?
	A.	The advancement team works to inspire connections, investments, and engagements that drive excellence and opportunity. To do that we feel we need to have deeper, more personalized connections with all audiences in the channels they want to interact with us in.

97.	Q.	1.4 TECHNOLOGY ECOSYSTEM Is the university looking to retain the current tools while implementing a new CRM in parallel or looking to consolidate as much as possible?
	A.	See question 99.
98.	Q.	5.5 PHASED APPROACH Are vendors expected to propose their own phasing structure or align with a university-defined model?
	A.	We encourage vendors to propose their own phasing structure and be open to adjusting based on feedback.
99.	Q.	1.4 Technology Ecosystem, page 7 Online Fundraising Ecosystem UNCG's current online fundraising ecosystem includes multiple platforms with overlapping functionality. For example, ETeam Sponsor, GiveCampus, Gravity Forms, Microsoft Forms, and Encompass are all in use. Would UNCG like to include in the scope of work a review of the current use cases for each platform and, where feasible, identify opportunities to consolidate into a single, shared solution to support standardization and reduce redundancy?
	A.	See question 150. UNCG is open to cost-effective solutions that help us achieve our goal of operational excellence.
100.	Q.	1.4 Technology Ecosystem, page 7 Marketing and Communications Ecosystem UNCG currently utilizes multiple platforms to support marketing and communications efforts, including EMMA, MailChimp, Mongoose Cadence, and Vozzi. Would UNCG like to include in the scope of work a review of the current use cases for each of these tools and, where feasible, explore opportunities to consolidate into a single, shared solution to promote consistency, reduce overlap, and streamline outreach efforts?
	A.	See question 99.
101.	Q.	1.4 Technology Ecosystem, page 7 Online Fundraising Ecosystem UNCG's online fundraising activities are currently supported by a range of tools, including ETeam Sponsor, GiveCampus, Gravity Forms, Microsoft Forms, and Encompass. Would UNCG like to include in the scope of work a review of the current use cases for each platform and, where feasible, identify opportunities to consolidate into a single, shared fundraising solution to support a more unified donor experience and reduce system redundancies?
	A.	See question 99.
102.	Q.	5.2.9 Integrations, page 18 To support the requirements outlined in Section 5.2.9, could UNCG please confirm which specific systems are in scope for integration with the new solution? The RFP references integration with Banner, WebFOCUS, and Power BI. What, if any are the additional systems—such as student data sources, financial systems, or third-party data append services (e.g., for wealth ratings or demographics)—that should also be included in the integration scope?
	A.	See responses to questions 41 and 43.
103.	Q.	5.1, Implementation Partner, page 17

		Would you please clarify whether this RFP is meant strictly to identify and select the CRM platform itself, or if UNCG would also consider proposals that bundle both the CRM solution and comprehensive implementation services at this stage?
	A.	UNCG intends to select an implementation partner with the same care as selecting the CRM solution. To that end, the UNCG will issue an additional RFP to potential implementation partners in or about June of 2025, once finalist CRM vendors are selected. Vendors are welcome to respond to this RFP with the implementation partner of their choice. However, UNCG reserves the right to select a different implementation partner.
104.	Q.	Attachment I: Functional & Technical Requirements (page 25) If the requirements listed in section 5.2 are met out-of-box utilizing a solution that is included in the proposal but an add-on module or third-party solution, would UNCG prefer that we mark such functionality as delivered “out of box”
	A.	If the purchase or installation of an additional tool or product is necessary to meet the full requirements, please mark the option as "Meets Requirement with Configuration." UNCG encourages vendor to clarify if any portion of the requirements can be met with out-of-box functionality, as well as the feature enhancements accomplished by utilizing an add-on module or third-party solution.
105.	Q.	Attachment I: Functional & Technical Requirements (page 25) If a portion of the requirements listed in section 5.2 are met via out-of-box functionality, with some aspects met via configuration, how would UNCG prefer vendors to respond?
	A.	Please mark the option as "Meets Requirement with Configuration." UNCG encourages vendor to clarify if any portion of the requirements can be met with out-of-box functionality, as well as the feature enhancements accomplished by configuration.
106.	Q.	Section 1.4 “Current Technology” (page 6) Are there solutions listed in this chart that UNCG is open to replacing or retiring beyond Ellucian’s Banner? Which of the listed solutions will be required to integrate with the new CRM solution on day-one of go-live?
	A.	See question 99.
107.	Q.	Section 2.6 “Proposal Contents” (page 10) Letter “b” speaks to inclusion of execution pages (assuming first three pages of the RFP document completed and signed and completed sections 4.4 and 6.1) as well as “the body of the RFP”. What exactly is meant by the “body” of the RFP, or which specific sections and pages?
	A.	The “Body of the RFP” refers to all pages of the RFP (i.e. Section 1.0 through Section 6.8). Please note that the proposal should also address those questions referenced in 4.4 Authorized Partner and 6.6 Contract Manager and Customer Service, as well as any attachments or deliverables.
108.	Q.	Section 1.3 “Current Fundraising Environment” (page 5) Can UNCG provide a breakdown of roles within each Unit? This will help inform all add-on module licensing needs.
	A.	See question 64 and more details here: https://giving.uncg.edu/about-us/our-team/
109.	Q.	Section 5.2.5 “Document Management” (page 18) To inform pricing needs, does UNCG have an estimated volume of documents generated annually for use cases such as gift receipts, gift agreements, acknowledgement letters, etc.?
	A.	We generate approximately 4,000 pledge reminders and receipts, 1200 acknowledgement letters, 1100 endowment reports (with over 2100 associated student thank you letters), and 40 gift agreements.

110.	Q.	Section 5.2.10 “Management of Projects, Events, Campaigns, and Volunteers” (page 19) To inform pricing needs for Event Management solution, can UNCG please answer the following questions: 1. How many events does the institution host annually? 2. What is the total number of Annual Registrations? 3. What is the total number of Registrations Free/Paid/Both? 4. What is the total number of event creators? 5. What is the total number of users who need visibility access (not event creators)? 6. Are there any event data that needs to be migrated? If so, what volume?
	A.	1. See question 196. 2. See question 200. 3. See question 196. 4. 20 5. 60 6. Migrated event data will be limited to registrants. See question 200 for volume.
111.	Q.	Section 5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK (Page 16) What are the minimum functions that need to be in place for go-live (e.g., full legacy system replacement, alumni portal replacement, etc.)?
	A.	UNCG requires that the new CRM fully replace the existing legacy platform functionality, which includes the core fundraising activities from constituent management to gift processing through development cycles and stewardship. Additionally, enhancements or functionality that do not exist today will be addressed and decided during the discovery and design phases to determine where additional features may be included, especially any that do not increase cost, resources, or timelines.
112.	Q.	Section 5.2 SPECIFICATIONS & REQUIREMENTS (Page 17) Does your institution have a focused stewardship, donor relations or giving society program?
	A.	We have two giving societies and anticipate the development of more. We engage in various stewardship activities, including but not limited to: sending gift acknowledgements, first time donor program, Minerva Society (loyalty) program, Planned Giving Society, endowment reports, impact statement distributions and much more.
113.	Q.	Section 5.2 SPECIFICATIONS & REQUIREMENTS (Page 17) Does your institution track paid alumni dues/memberships?
	A.	In the past, we did, but we do not currently track alumni dues/memberships.
114.	Q.	Section 1.3 CURRENT FUNDRAISING ENVIRONMENT (page 5) 1. Are there any additional shadow databases that need to be migrated? 2. How many total New Constituent records will need to be migrated? 3. How many total Income/Gift records will need to be migrated? 4. How many new Constituent (Entity) and Gift records are estimated to be added on a yearly basis? 5. Are you aware of any data issues in your current legacy system (e.g., historical data issues from a prior conversion that were never cleaned up, etc.)?
	A.	1. No. 2. See question 1 3. See question 4.

		4. Our office creates roughly 8,000-10,000 constituents annually. We enter approximately 9,200 gifts annually 5-year average of gifts, pledges, soft credits) 5. We do not track soft credit currently but that is a desire in the new system.
115.	Q.	Section 1.4 TECHNOLOGY ECOSYSTEM (page 6) Is there an Integration/Middleware solution in place for existing integrations?
	A.	See question 190. We use many different things for middleware, depending on the applications involved in the flow of data. Certain applications often require their own middleware. More fundamentally, we can support various kinds of data integrations (flat file, APIs, Banner Ethos, etc.). Additionally, we use uc4/automic for Banner-centric processes and scheduled automations. We develop separate custom integrations wherever a vendor-supplied integration method is not provided. We're resourced to support a wide range of data integrations.
116.	Q.	Section 1.3 CURRENT FUNDRAISING ENVIRONMENT (page 5) Are you using payment processors today for financial transactions? If yes, which products and for what type of information?
	A.	We utilize Authorize.net (Encompass and eTeamSponsor), Stripe (GiveCampus), CyberSource (Encompass for non-gift revenue), and First View (OneCause).
117.	Q.	Section 5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK (Page 16) For External Constituent Portal, please indicate which of the following features are of interest: Events, Volunteer Management, Chapters/Clubs, Mentoring, News, Directory, Online Giving, Profile Updating/Viewing, Giving History Portal, Job postings and referrals.
	A.	All of the above are features of interest.
118.	Q.	1.4 (Page 6) Which of the current technologies listed are to be replaced? Which will be kept and should integrate with the new CRM solution?
	A.	See question 111.
119.	Q.	1.4 (Page 6) Does UNCG have a preferred middleware tool for integrating systems together?
	A.	See question 115.
120.	Q.	1.4 (Page 6) For products that will be replaced, when are their current contracts or licenses set to expire?
	A.	See Question 118.
121.	Q.	2.3 (Page 8) The contract award/ start date is listed as "on or about September 5th, 2025." However, page 18 states the that "UNCG expects to start the implementation in 2026 and is targeting a 2027 go-live."Can you clarify the anticipated implementation start date? (We recognize that September 2025 may be in fiscal year 2026.)
	A.	The University's intent is to have a vendor selected and an award made on or about September 5th, 2025. We anticipate the actual implementation process beginning in early 2026 after the conclusion of our comprehensive campaign.

122.	Q.	2.3 (Page 8) How long does it typically take for a new partner to agree to a negotiated MSA with UNC?
	A.	Contract negotiations may take up to 2-3 months depending on a variety of considerations. For example, any proposal which references a UNC System Office MSA would have already been negotiated and therefore move more quickly. Generally speaking, UNCG’s Office of Institutional Integrity and General Counsel will lead these negotiations with new partners as required by General Statute, based on the anticipated total contract value. Subsequent approval from the UNC System Office may also be required dependent on the internal funding source utilized.
123.	Q.	2.3 (Page 8) How will UNCG ensure there is enough time between the award and start dates to account for the MSA negotiation period?
	A.	UNCG has already engaged with the Office of Institutional Integrity and General Counsel, so they are aware and have dedicated resources to this project.
124.	Q.	5.5 (Page 21) The RFP asks for a "phased approach to implementation as follows." What is the phase sequence that UNCG would like a vendor to follow? Are you open to a phase suggested by the vendor?
	A.	See Question 69.
125.	Q.	5.5 (Page 21) If the vendor is providing phases, can UNCG provide a prioritized list of features/ capabilities that the vendor can use for creating implementation phases?
	A.	UNCG is open to working with the vendor to identify critical functionality using MoSCoW or utilize an alternative prioritization framework provided by the vendor.
126.	Q.	1.4 (Page 6) What is the expected frequency of integrations (weekly, daily, real time, etc)?
	A.	This is dependent on the type of data that is being integrated. Some examples: it would be desired that wealth screening information for a prospect could be integrated from a third-party vendor on demand; gift information would flow into Banner at least daily (or more frequently if possible); contact reports should be instantly available to users, etc.
127.	Q.	1.4 (Page 6) What is the expected transaction volume during integration?
	A.	See question 4
128.	Q.	1.4 (Page 6) Is an integration with Banner Finance, or some other finance system, required?
	A.	Yes. Integration with Banner Finance will be required.
129.	Q.	1.1 (Page 5) Is there a dedicated budget for license and implementation assigned? Or will the RFP process be used to request budget?

	A.	See question 164.
130.	Q.	5.1 (Page 16) Given that Banner is the current system of record, is there any intention of keeping Banner as a system of record for Advancement upon project completion?
	A.	We intend for the CRM to be the new system of record for university advancement (i.e., Alumni records). Banner will still remain the university's ERP and this system will still need to retrieve and push data to it.
131.	Q.	5.2.9 (Page 18) Will UNCG consider migrating more data domains from Banner (e.g., partial student data) into the new CRM prior to graduation?
	A.	Yes, UNCG is open to that possibility.
132.	Q.	1.4 (Page 6) Does the University plan to retain any of the multiple online giving solutions (e.g., iModules, GiveCampus, Gravity Forms)?
	A.	See question 99.
133.	Q.	1.4 (Page 6) In the current technology stack, there are systems mentioned utilized by Athletics (e.g., Vozzi, TicketMaster, OneCause). Are those systems up for consideration for replacement or is Athletics a seperate entity where integration should be considered for their platforms?
	A.	Athletics makes their own technology purchases in consultation with university advancement, integration for existing platforms should be a primary consideration but as the university matures its operational excellence initiatives platform consolidation should also be a consideration.
134.	Q.	5.2.6 (Page 18) There are some requirements related to engagement, is their a goal of consolidating communication tools and replacing Emma, MailChimp and Mongoose to acheive the reduction in systems and centralizing engagement data?
	A.	UNCG university advancement has a strong preference for communication platform consolidation assuming a consolidated platform meets all business needs.
135.	Q.	1.4 (Page 6) Is Databricks being utilized for the entire University or just Advancement?
	A.	Databricks is used for every kind of campus use case by our Enterprise Data Engineering team.
136.	Q.	1.4 (Page 6) Are there existing initiatives or interest in leveraging your Data Lake to consolidate data in support of Advancement goals and strategies?
	A.	See question 26.
137.	Q.	1.2 (Page 5)

		As a research-based institution, does the Advancement team play a role in tracking or supporting research initiatives, particularly as they relate to corporate engagement, alumni involvement, or the management of research grants?
	A.	Our colleagues in Research & Engagement currently use Cayuse as their research administration software. We have a preference to have richer data of that type within the CRM to have a fuller picture of our corporate and foundation partners.
138.	Q.	4.8 Vendor Experience. Page 15 Is UNC Greensboro a 501(c)3 organization? What is the exact tax status of the University?
	A.	UNC Greensboro is a tax-exempt Public/State Controlled Institution of Higher Education. Please refer to this website for more information regarding our related foundations: https://sac.uncg.edu/foundations/
139.	Q.	6.4 Periodic Monthly Status Reports. Page 22 What is the timeline expectation of the delivery of the project from contract award/start date to completion?
	A.	Conversations with peer schools who have recently undergone this process indicates that depending on the scope and complexity of the contract this can take anywhere between 12 and 24+ months. UNCG cannot offer an explicit expectation at this time.
140.	Q.	Section 1.3, Page 5 Please list an approximate number of users by department/role, including any external users and/or volunteers.
	A.	See question 64.
141.	Q.	Section 1.3, Page 5 Could you please share an organizational chart for University Advancement?
	A.	See question 189.
142.	Q.	Section 5.2.12, Page 19; 5.2.16, Page 20 Please share any CRM customizations required for a proposed new CRM system.
	A.	We have a strong preference to limit customizations and are willing to modify current business processes to align with baseline functionality of a CRM platform.
143.	Q.	Section 1.4, Page 6 Please share how University Advancement and ITS plan to staff this project in support of implementation. Will there be a dedicated University project manager? Who will be the University's responsible party for managing data migration?
	A.	See questions 11 and 13.
144.	Q.	Section 5.2.16, Page 20 Once the new CRM is live, who will own the maintenance and support for the new system? Are there dedicated UNCG resources with general or specific CRM training and certifications, or do you plan to have them? Please clarify any existing skillsets or certifications relevant to potential University Advancement CRM software options.
	A.	University Advancement has a dedicated team of three for data maintenance and support. Staff are encouraged to see training and certifications that support the systems that we utilize.

145.	Q.	Section 5.2.12, Page 19 Are current advancement business process documents available, or should the project include scope to develop process documents?
	A.	University Advancement maintains business process documentation for the majority of operations processes and other business units within advancement. We recognize these current processes may not be best suited for a new platform and are open to changing those processes.
146.	Q.	Section 1.4, Page 6 Will ITS support any required University Advancement migration and integration work?
	A.	Yes.
147.	Q.	Section 5.2.8, Page 18 What University middleware integration tools and methods will support data integration with the new CRM?
	A.	See question 115.
148.	Q.	Section 5.2.8, Page 18 What is the current integration frequency for data flow?
	A.	Reporting in UABanner uses live Banner data. EverTrue and Encompass roundtrip nightly. No other system has a direct integration with Banner. Data is manually imported or entered into Banner from all other systems.
149.	Q.	Section 1.4, Page 7 Please explain how UNCG's Enterprise Data Lake may be useful for this project.
	A.	See question 26.
150.	Q.	Section 5.2.16, Page 20 Does University Advancement have an existing constituent/donor portal? Is a constituent portal included in the desired scope for implementation? If so, please share what features and functionality are required, and which audiences the portal will serve.
	A.	UNCG university advancement currently utilizes Anthology Encompass for our existing donor portal. Per section 5.2.16 it would be ideal for the CRM to have the ability to offer constituent/donor portals. At a minimum the platform should be able to integrate with some sort of portal as described in 5.2.9. The desire is for alumni, donors, volunteers and more to have access to the portal as we see fit. Our current donor portal allows donors and alumni to authenticate by maiden/last name, email and class year and to make gifts, manage recurring gifts and pledges and update contact information, share employment information and leave class notes. We want to keep these features as well as additional features: generate documents (like fund reports, receipts, gift/event confirmations, gift histories, etc.) update contact and demographic data, register for events, unsubscribe to mailings/emails, and much more.
151.	Q.	Section 1.3, Page 5 What is your current data allotment by tables and rows? For example: a. How many Contact records will be migrated? b. How many entities/organizations/accounts will be migrated? c. What is the volume of Gift records to be migrated?

	A.	A. Contact records: 344,626 records in Banner. This does not include contacts from other systems (i.e. Mongoose text chains) B. See question #1 C. See question #4
152.	Q.	Section 5.2.1, Page 17 How many marketing users will there be?
	A.	UNCG estimates 20 users.
153.	Q.	Section 5.2.1, Page 17 Is SMS/Text Messaging a go-live requirement?
	A.	Yes.
154.	Q.	Section 5.2.1, Page 17 How many total CRM database contacts do you anticipate marketing to?
	A.	See questions 155, 160, and 195.
155.	Q.	Section 5.2.1, Page 17 What is the total volume of historical email sent monthly/annually?
	A.	FY25: Average of 14,600 contacts per send; 276 total campaigns sent; 3,922,602 total deliveries
156.	Q.	Section 5.2.1, Page 17 Will departments external to University Advancement require access to CRM marketing features and functionality?
	A.	This is not anticipated initially but we would like security features as described in 5.2.15.
157.	Q.	Can the RFP deadline be extended through June 6th please? We have several staff out the week of May 26th due to the Memorial Day holidays. Any consideration would be greatly appreciated.
	A.	The University is considering offering an extension to the proposal submission deadline. Any such extension shall be communicated via a separate addendum and similarly posted to the NC eVP website. Please be sure to routinely check the eVP portal for additional communications.
158.	Q.	Did UNCG work with any 3rd party consulting companies on the creation of this RFP? If so who did you work with?
	A.	UNCG engaged with the third-party consulting firm Bentz Whaley Flessner (BWF) with limited scope for this project, including: Needs Assessment and Technology Evaluation, Business Process Evaluation, and Marketplace Assessment. They are also contracted throughout this process to assist the selection committee with the selection process and with contract review if requested or required by UNCG.
159.	Q.	How many users do UNCG expect to be using the new Advancement CRM system once live? Will you be expecting user growth over the next 5 years and if so can you clarify number of additional users?
	A.	UNCG estimates 60 users total once live. There may be user growth over the next five years to include campus partners which would total no more than 40-60 additional users.

160.	Q.	How many primary e-mail addresses do you have in your current Banner Advancement system?
	A.	518,920 active preferred email addresses. 169,928 for constituents that we plan to migrate
161.	Q.	Are there any campus initiatives to look at a new campus wide digital marketing solution? If so potential timing for a decision.
	A.	We are unaware of any initiative to consolidate university communications platforms to a single enterprise solution. Currently, we use a combination of tools including EMMA, Slate, SendGrid, etc. We collaborate with central strategic communications to evaluate effective use of platforms.
162.	Q.	What system is UNCG using for Admissions?
	A.	UNCG Admissions uses Slate.
163.	Q.	Does the UNCG Advancement or IT team have any training with the Microsoft Power Platform?
	A.	Yes, a member of our Workflow/Automation team has been designated as a resource to understand the MS Power Platform and to help campus utilize it for business efficiency. Our Reporting team has extensive use/expertise in Power BI as well.
164.	Q.	Could you clarify the available budget or any specific budgetary limitations applicable to this project?
	A.	There is a fixed budget for this project that cannot be exceeded.
165.	Q.	Are there any expected modifications to the project scope or adjustments in priorities that vendors should anticipate during implementation?
	A.	See response to Question 19.
166.	Q.	Is there an incumbent vendor currently providing these services, and if so, what is the financial value of their existing contract and contractor name & number?
	A.	UNCG University Advancement does not currently have a true CRM platform and relies on a combination of platforms to provide functionality that a CRM would provide.
167.	Q.	Do commercial (private sector) references carry different weight or value compared to governmental or educational institution references?
	A.	See section 4.9 of RFP.
168.	Q.	Section 3.4, Page 12 How much weight or significance is given to the use of specific CRM platforms, such as Salesforce, during the proposal evaluation?
	A.	As referenced in Section 3.4 Evaluation Method, the evaluation method used for this solicitation is narrative and by consensus. This method requires the evaluation committee to offer a narrative summary of the strengths and weaknesses of each proposal relative to the evaluation criteria. As such, a relative weight or score is not directly ascribed. Any award resulting from this solicitation will be made to the proposal which achieves the best value based on the following criteria in order of importance: • Vendor Experience & Qualifications • General Product Overview • CRM Functionality

		• Pricing • Ability to Deliver Against Requirements & Specifications
169.	Q.	Does UNCG have a preference or particular interest in vendors who offer pricing based on the GSA Schedule?
	A.	UNCG does not have a particular preference or interest in obtaining pricing based on the GSA schedule unless the cost is more advantageous than that of the open market.
170.	Q.	Section 5.2.18, Page 20 Does UNCG prefer training sessions to be conducted on-site (in-person), remotely (virtual), or through a hybrid approach?
	A.	Post go-live we would prefer training sessions to be conducted primarily remotely. During implementation there may be opportunities for on-site training. UNCG will work directly with the selected vendor to scope any necessary on-site dates.
171.	Q.	Section 6.5, Page 22 Is the performance of work under this contract expected to be conducted remotely, or will on-site presence be required?
	A.	UNCG would expect that the majority work for this project be completed remotely. Opportunities for onsite activities may be an option during initial kick-off, key testing periods, or Go-Live week. UNCG will work directly with the selected vendor to scope any necessary on-site dates.
172.	Q.	Would UNCG consider granting a one-week extension to the current proposal submission deadline to allow vendors to provide more comprehensive proposals?
	A.	The University is considering offering an extension to the proposal submission deadline. Any such extension shall be communicated via a separate addendum and similarly posted to the NC eVP website. Please be sure to routinely check the eVP portal for additional communications.
173.	Q.	Section 1.4, Page 6 Does UNCG have a preference for any particular CRM software platforms or vendors based on previous experiences or existing software integrations?
	A.	UNCG has no preference toward any particular CRM software platform or vendor. All proposals will be reviewed and evaluated utilizing the criteria
174.	Q.	What type of feedback will unsuccessful bidders receive regarding their proposal submissions following the award decision?
	A.	While the University is under no obligation to provide unsuccessful bidders feedback regarding the award decision, it is highly encouraged as a best practice. The evaluation method used for this solicitation is narrative and by consensus. As such, the evaluation team will effectively weigh the strengths and weaknesses of each proposal and document them in a consolidated format. Any award will be made to the vendor who best meets the business needs in accordance with the evaluation criteria outlined in Section 3.4. That said, the University may opt to hold a post-award conference to communicate the decision rationale.
175.	Q.	Is UNCG contractually obligated or otherwise committed to providing feedback to all vendors regarding the strengths or weaknesses of their proposals?
	A.	See Question 174.
176.	Q.	Section 5.2.17, Page 20 Will UNCG require a User Acceptance Testing (UAT) or sandbox environment to facilitate system testing and validation during implementation?

	A.	Most likely but UNCG would also welcome recommendations from the implementation partner to be selected in a separate RFP.
177.	Q.	Section 4.7, Page 15 What specific documentation or evidence is required from vendors to demonstrate a satisfactory "good faith effort" towards meeting the HUB participation goal?
	A.	As ascribed by North Carolina General Statute 143-128.2, the State has set a goal of 10% participation by minority vendors for building (construction) projects, as well as other contracting and procurement activities. Attachment D: HUB Supplemental Vendor Information form is used to identify any vendors [or their subcontractors] which may currently possess an NC-HUB certification. The University recognizes that this participation goal may be unattainable in all instances, and does not penalize any non-HUB vendors during the evaluation process.
178.	Q.	Section 4.7, Page 15 Could you explain how proposals will be evaluated if the vendor is unable to meet the 10% HUB participation goal? Specifically, will this significantly impact scoring, or will documented good-faith efforts and alternative strategies be sufficient to avoid penalization during evaluation?
	A.	The University recognizes that this participation goal may be unattainable in all instances, and does not penalize any non-HUB vendors during the evaluation process.
179.	Q.	Section 4.7, Page 15 Could you clarify whether demonstrating a documented "good faith effort" to meet the 10% HUB participation goal is acceptable if the exact percentage cannot be achieved?
	A.	Vendors are encouraged to meet this goal wherever feasible, though it is not specifically required. Good faith efforts should be documented on Attachment D: HUB Supplemental Vendor Information or any supporting documents.
180.	Q.	Section 5.4, Page 21 Do all vendors need to submit each listed assurance document (SOC2, SOC3, HITRUST, etc.), or only those applicable specifically to our CRM solution and services?
	A.	Vendors only need to submit the documents that are applicable/relevant to this CRM procurement. These documents are used by IT Security and Software Asset Management to assess and produce a security posture on the product. Not all the listed documents are required, but typically the more that a vendor can supply will help to conduct a more thorough evaluation and to achieve a higher confidence rating in the business engagement.
181.	Q.	Section 5.4, Page 21 Is UNCG expecting all these assurance documents to be included directly within the main proposal submission file, or should these documents be submitted separately as clearly labeled appendices?
	A.	Responsive Bidders may opt to include these documents within the main submission file, provided that they are clearly labeled. That said the preference would be for these to be included as appendices.
182.	Q.	Section 3.4, Page 12 Can you provide the evaluation rubric or weightings across major criteria (e.g., technical fit, experience, cost, support, HUB participation)?
	A.	As referenced in Section 3.4 Evaluation Method, the evaluation method used for this solicitation is narrative and by consensus. This method requires the evaluation committee to offer a narrative summary of the strengths and weaknesses of each proposal relative to the evaluation criteria. As such, a relative weight or score is not directly ascribed. Any award resulting from this solicitation will be made to the proposal which achieves the best value based on the following criteria in order of importance: • Vendor Experience & Qualifications • General Product Overview

		• CRM Functionality • Pricing • Ability to Deliver Against Requirements & Specifications
183.	Q.	Section 3.4, Page 12 Will all sections of the proposal be scored equally, or are some (e.g., CRM functionality or vendor experience) weighted more heavily?
	A.	Any award resulting from this solicitation will be made to the proposal which achieves the best value based on the following criteria in order of importance: • Vendor Experience & Qualifications • General Product Overview • CRM Functionality • Pricing • Ability to Deliver Against Requirements & Specifications
184.	Q.	Do they want each of those questions answered in section 5.2? Or only the Attachment 1 form completed?
	A.	The Specifications and Requirements listed in Section 5.2 are to be used for reference when completing Attachment I: Functional & Technical Requirements Checklist. Attachment I simply lists the subsections incorporated of Section 5.2. If there are exceptions to the individual requirements in each subsection, the vendor may opt to include or provide a list of each specific item separately. Please note, UNCG does not expect or require that a single solution meets all the requirements.
185.	Q.	Are these sections for reference or do they want narratives and a list here? (Bottom of Page 16) **Software Features and Capabilities** Vendor should include in their proposal a comprehensive list of features and functionalities offered by the proposed CRM system, with specific emphasis on capabilities relevant to fundraising and donor management. Detail key features such as constituent management, campaign management, gift processing, prospect and moves management, event management, reporting and analytics, and integration with third-party tools or platforms commonly used in fundraising. Include details on any specialized modules or add-ons available to enhance the CRM system's functionality for fundraising purposes, such as online donation processing, peer-to-peer fundraising, and event management. Provide details about any marketing specific modules, platform add-ons, or integration options. Include all key features available for marketing automation, content management, and any additional features for marketing and communication strategy deployment aimed at donor acquisition, retention, and stewardship. **Support and Maintenance Services** As part of the RFP response, Vendor should provide an overview of their support and maintenance offerings, including available support channels (e.g., phone, email, ticketing system), hours of operation, and response times for resolving technical issues or inquiries. Include a description of ongoing maintenance services provided, such as software updates, bug fixes, and security patches, along with the frequency of updates and the total logged downtime or disruption to service in 2024. Vendor should list any recommended staffing UNCG should consider to maintain or enhance the system. Vendor should also provide information on training resources and knowledge transfer opportunities offered to ensure that users are proficient in utilizing the CRM system effectively and maximizing its benefits.
	A.	Yes, vendors should address both sections referenced in the question within their comprehensive proposal.
186.	Q.	RFP Section 1.3, Page #5 What are UNC Greensboro Advancement’s 5-year strategic goals?
	A.	See responses to Question 14 and 15.

187.	Q.	RFP Section 2.6, Page #10 UNC Greensboro expecting vendors to provide narrative-type responses explaining how the solution meets the bulleted requirements within each section?
	A.	UNCG recommends vendors describe a comprehensive picture of the CRM solution as they most closely relate and align to the stated requirements.
188.	Q.	RFP Section 1.3, Page #5 How many users will need access to the new system?
	A.	UNCG currently estimates 60
189.	Q.	RFP Section 1.3, Page #5 What is the organizational breakdown of UNC Greensboro advancement?
	A.	Please see our organization breakdown here https://giving.uncg.edu/about-us/our-team/
190.	Q.	RFP Section 1.4, Page #7 What is the current middleware/ETL solution UNC Greensboro utilizes for integrations on campus?
	A.	UNCG uses a variety of middleware, depending on the applications involved in the flow of data. Certain applications often require their own middleware. More fundamentally, we can support various kinds of data integrations (flat file, APIs, Banner Ethos, etc.). Additionally, we use uc4/automic for Banner-centric processes and scheduled automations. We develop separate custom integrations wherever a vendor-supplied integration method is not provided. We're resourced to support a wide range of data integrations.
191.	Q.	RFP Section 1.4, Page #7 Which integrations will be required at the time of Go-Live?
	A.	See question 111.
192.	Q.	RFP Section 5.2.8, Page #18 What percentage of UNC Greensboro's gifts are entered manually or via automation?
	A.	59% of gifts come in from online channels. Encompass is the only system that imports/exports into Banner, but those gifts still require manual confirmation/review before entry is complete. As such, 100% of gifts are entered manually/require user interference.
193.	Q.	RFP Section 1.3, Page #5 How many users do you anticipate will need access to the digital marketing tools?
	A.	See question 152.
194.	Q.	RFP Section 5.2, Page #18 How many contacts do you anticipate communicating with within your database?
	A.	100% of them.
195.	Q.	RFP Section 5.2, Page #18 What is the total e-mail volume you anticipate sending annually?

	A.	UNCG estimates approximately 15,000 contacts per month; around 300 total campaigns annually (our email base is roughly 80-100k constituents)
196.	Q.	RFP Section 5.210, Page #19 How many events does UNC Greensboro Advancement host annually?
	A.	The Alumni team hosts on average 70 events per year and 10% of those are paid events. The events team hosts about 50 events per year, all of which are free for attendees.
197.	Q.	RFP Section 5.2.10, Page #19 How many events are free?
	A.	See question 196.
198.	Q.	RFP Section 5.2.10, Page #19 How many events are paid?
	A.	See question 196.
199.	Q.	RFP Section 5.2.10, Page #19 How many registrants are there annually?
	A.	Each event hosts between 5 and 2,500 people. The most we've had register in advance for a single event is approximately 500, and then we register "walk-ins" at the time of the event.
200.	Q.	RFP Section 1.3, Page #5 How many staff members need access to create events?
	A.	UNCG estimates 12 users.
201.	Q.	RFP Section 1.4, Page #6 How much customization has been added to the Banner Advancement System?
	A.	Banner Advancement has minimal customizations.
202.	Q.	RFP Section 1.3, Page #5 How many people on staff write/create reports?
	A.	UNCG estimates 5 people on the Advancement Team.
203.	Q.	RFP Section 1.3, Page #5 Will Central IT support Advancement Services in maintaining the solution once live?
	A.	Yes, ITS will continue to offer support to the Advancement team.
204.	Q.	RFP Section 1.3, Page #5 Has the university engaged a consultant to assist with governance, RFP requirement prep, evaluation process?

	A.	See Questions 19 and 158.
205.	Q.	RFP Section 1.3, Page #5 How many advancement solutions has UNC Greensboro previewed in the last 18 months in preparation for the RFP?
	A.	Outside of occasional webinars or cursory encounters at conferences we have not comprehensively previewed any solutions in the past 18 months.
206.	Q.	RFP Section 1.4, Page #7 Does UNC Greensboro Athletics currently leverage Banner with Advancement for gift processing and CRM functionality? If not, is including them in the new CRM part of the streamlining, innovating, and improving efficiencies in UNC Greensboro advancement?
	A.	Yes, Athletics works with central Advancement for gift processing and CRM functions.
207.	Q.	RFP Section 5.2, Page #18 Is the intention to have the documents in Sharepoint and or One Drive migrated to the new CRM?
	A.	Not all documents in Sharepoint/OneDrive need to be migrated, but there is gift documentation and some constituent files that would ideally be available for viewing in the new CRM.
208.	Q.	RFP Section 2.3, Page #8 Is the opening of vendor proposals public or just for UNC Greensboro staff?
	A.	The virtual opening of vendor proposals is a public event, as required by General Statute. Vendors or interested parties may attend at their discretion but are not required. Due to the complexity of this RFP, the opening will be a high-level overview of the proposals submitted, and any clarifications needed will be requested in writing via email at a later time. The Microsoft Teams Meeting Login Information for the virtual opening is included in Section 2.3 Proposal Schedule for reference.