UNIVERSITY OF NORTH CAROLINA GREENSBORO

University Advancement

Request for Proposal #: 69-2941

CRM System Selection

Date of Issue: Tuesday, April 29th, 2025

Written Question Submission Deadline: Wednesday, May 7th, at 12:00PM ET

Proposal Submission Deadline: Wednesday, May 30th, 2025 at 2:00PM ET

Direct all inquiries concerning this RFP to:

Anthony S. Kilar

Assistant Director of Procurement Services

Email: askilar@uncg.edu

Phone: (336) 334 - 4463

UNIVERSITY OF NORTH CAROLINA GREENSBORO

Request for Proposal #

69-2941

For internal State agency processing, including tabulation of proposals, provide your company's Tax Identification Number (TIN). Pursuant to G.S. 132-1.10(b) this identification number shall not be released to the public. **This page will be removed and shredded, or otherwise kept confidential**, before the procurement file is made available for public inspection.

This page shall be filled out and returned with your proposal.
Failure to do so may subject your proposal to rejection.

____

Vendor Name

____

Vendor TIN #

Note: For a contract to be awarded to you, your company (you) must be a North Carolina registered vendor in good standing. You must enter the vendor number assigned through eVP (Electronic Vendor Portal). If you do not have a vendor number, register at https://vendor.ncgov.com/vendor/login

ONLY Electronic responses via eVP will be accepted for this solicitation.

STATE OF NORTH CAROLINA University of North Carolina Greensboro	
Refer *ALL* Inquiries regarding this RFP to: *Anthony S. Kilar* *Assistant Director of Procurement Services* *Email: askilar@uncg.edu* *Phone: (336) 334-4463*	**Request for Proposal #: 69-2941** **Proposals will be publicly opened (virtually):** **May 30th, 2025 at 3:00PM via Microsoft Teams** *(Meeting Login Information contained in Section 2.4 below)*
Using Agency: UNC Greensboro **Requisition No.: TBD**	**Commodity No. and Description:**

EXECUTION

In compliance with this Request for Proposals (RFP), and subject to all the conditions herein, the undersigned Vendor offers and agrees to furnish and deliver any or all items upon which prices are bid, at the prices set opposite each item within the time specified herein.

By executing this proposal, the undersigned Vendor understands that false certification is a Class I felony and certifies that:

- this proposal is submitted competitively and without collusion (G.S. 143-54),
- none of its officers, directors, or owners of an unincorporated business entity has been convicted of any violations of Chapter 78A of the General Statutes, the Securities Act of 1933, or the Securities Exchange Act of 1934 (G.S. 143-59.2), and
- it is not an ineligible Vendor as set forth in G.S. 143-59.1.

Furthermore, by executing this proposal, the undersigned certifies to the best of Vendor's knowledge and belief, that:

- it and its principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal or State department or agency.

As required by G.S. 143-48.5, the undersigned Vendor certifies that it, and each of its sub-Contractors for any Contract awarded as a result of this RFP, complies with the requirements of Article 2 of Chapter 64 of the NC General Statutes, including the requirement for each employer with more than 25 employees in North Carolina to verify the work authorization of its employees through the federal E-Verify system.

As required by Executive Order 24 (2017), the undersigned vendor certifies will comply with all Federal and State requirements concerning fair employment and that it does not and will not discriminate, harass, or retaliate against any employee in connection with performance of any Contract arising from this solicitation.

G.S. 133-32 and Executive Order 24 (2009) prohibit the offer to, or acceptance by, any State Employee associated with the preparing plans, specifications, estimates for public contracts; or awarding or administering public contracts; or inspecting or supervising delivery of the public contract of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of this response to the RFP, the undersigned certifies, for Vendor's entire organization and its employees or agents, that Vendor is not aware that any such gift has been offered, accepted, or promised by any employees of your organization.

By executing this proposal, Vendor certifies that it has read and agreed to the **INSTRUCTION TO VENDORS** and the **NORTH CAROLINA GENERAL TERMS AND CONDITIONS incorporated herein.** These documents can be accessed from the ATTACHMENTS page within this document.

Failure to execute/sign proposal prior to submittal may render proposal invalid and it MAY BE REJECTED. Late proposals shall not be accepted.

COMPLETE/FORMAL NAME OF VENDOR:			
STREET ADDRESS:		P.O. BOX:	ZIP:
CITY & STATE & ZIP:		TELEPHONE NUMBER:	TOLL FREE TEL. NO:
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE (SEE INSTRUCTIONS TO VENDORS ITEM #21):			
PRINT NAME & TITLE OF PERSON SIGNING ON BEHALF OF VENDOR:		FAX NUMBER:	
VENDOR'S AUTHORIZED SIGNATURE*:	**DATE:**	EMAIL:	

VALIDITY PERIOD

Offer shall be valid for at least sixty 60 days from date of bid opening, unless otherwise stated here: ______ days, or if extended by mutual agreement of the parties in writing. Any withdrawal of this offer shall be made in writing, effective upon receipt by the agency issuing this RFP.

ACCEPTANCE OF PROPOSAL

If your proposal is accepted, all provisions of this RFP, along with the written results of any negotiations, shall constitute the written agreement between the parties ("Contract"). The NORTH CAROLINA GENERAL TERMS AND CONDITIONS are incorporated herein and shall apply. Depending upon the Goods or Services being offered, other terms and conditions may apply, as mutually agreed.

FOR University USE ONLY: Offer accepted and Contract awarded this________ day of __________, 2025.

The attached certification, by ____.

(Authorized Representative of UNC Greensboro)

Contents

1.0 PURPOSE AND BACKGROUND

The University of North Carolina at Greensboro (UNCG) requests proposals from qualified Constituent Relationship Management (CRM) System providers to replace its existing technology with a comprehensive, transformative solution that will enable the organization to realize a robust and modern environment that optimally supports current fundraising needs while being customizable and scalable for the growth and development required by our institution's bold future plans. It is anticipated the selection of a CRM System and implementation partner will be completed by September of 2025. The intent of this solicitation is to award an Agency Specific Contract for the products and/or services described herein.

1.1 CONTRACT TERM

The contract shall have an initial term of three (3) years, beginning on the date of final Contract execution (the "Effective Date").

At the end of the Contract's initial term, the University shall have the option, in its sole discretion, to renew the Contract on the same terms and conditions for up to two (2) additional one-year terms. The University will give the Vendor written notice of its intent to exercise each option no later than sixty (60) days before the end of the Contract's then-current term. In addition to any optional renewal terms, and with the Vendor's concurrence, the University reserves the right to extend the Contract after the last active term. Pursuant to North Carolina General Statute 143-53(d), the total contract term, including all extensions and renewals, shall not exceed a maximum of ten (10) years.

1.2 INSTITUTIONAL OVERVIEW

Established in 1891 near the geographical center of the state, UNCG was founded in response to a crusade by Dr. Charles Duncan McIver to provide public higher education opportunities to women. Since then, UNCG has expanded both its student body and its mission. In 1964, the university opened enrollment to men and adopted its current name, and in late 1971, the North Carolina General Assembly combined all sixteen state-supported institutions into a single University of North Carolina. Today, UNCG operates under the current leadership of Chancellor Dr. Franklin D. Gilliam, Jr.

From the first class of 198 students in 1892 to today's institution of over 18,000 students, UNCG continues to be committed to high-quality public higher education opportunities. The institution offers more than 150 undergraduate programs and over 200 areas of graduate study. The school is recognized as one of the best colleges by *U.S. News & World Report*, as well as by the *Wall Street Journal*, for offering the greatest social mobility opportunities to its graduates and delivering a top-quality student experience. *The Military Times* has also distinguished UNCG as a Best for Vets College. Carnegie Foundation categorizes UNCG as a high-research, community-engaged, doctoral university. The institution secures over $65 million in annual external funding and is known for its programs in health and wellness, the arts, nursing, and education.

UNCG is dedicated to achieving meaningful accomplishments by bringing community and university-based knowledge together, in and out of the classroom, and on and off campus. UNCG collaborates with individuals, community organizations, and businesses at the local, state, and national levels to make a positive, significant, and lasting difference in our world. In all things, UNCG's vision is to redefine the public research university for the 21st century as an inclusive, collaborative, and responsive institution making a difference in the lives of students and the communities it serves.

1.3 CURRENT FUNDRAISING ENVIRONMENT

The UNCG University Advancement Office is responsible for the engagement, fundraising, stewardship, communications, and special events related to building and sustaining lifelong relationships with donors, alumni, /faculty, staff, and friends, as well as cultivating philanthropic gifts to support the mission of the University. The University Advancement Office is made up of approximately 50 staff and is comprised of the following units:

- Vice Chancellor's Office
- Advancement Communications
- Advancement Operations
- Alumni Engagement
- Development
- Philanthropic Engagement

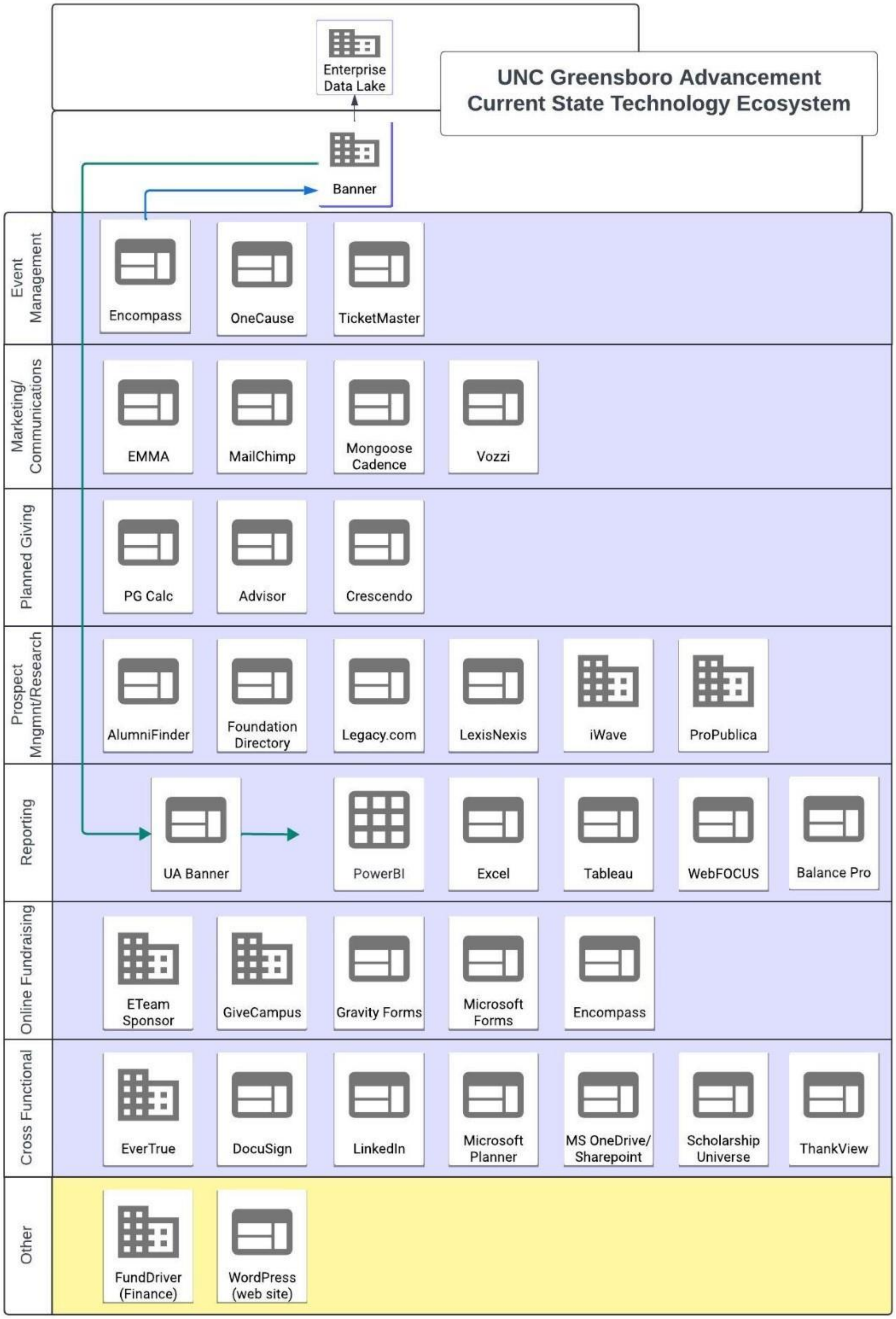
In December 2025, UNCG will be culminating a successful 10-year Light the Way campaign, which surpassed its goal to raise over $200 million to propel UNCG to a future brilliant with possibility by raising funds to strengthen three key areas: access, excellence, and impact. As the University positions itself for continued growth and development, UNCG University Advancement is embarking on an effort to modernize our development technology ecosystem. A significant part of this effort will be to replace the existing fundraising database through the implementation of a new CRM system to support the advancement team. The purpose of this project is to develop and implement an industry-leading application for the UNCG University Advancement Office to streamline access to and entry of information while innovating and improving efficiencies beyond the current environment.

1.4 CURRENT TECHNOLOGY

The University utilizes the following tools as part of daily functions, processes, and reports. The high-level analysis for these tools is incorporated into the subsequent findings and recommendations.

Tool Name	Purpose
Ellucian's Banner	Current student, finance, and donor database. Student and finance teams will continue to use Banner. Advancement uses Banner for management of alumni, parent, and donor records, including giving.
Advisor	Financial planning and projection tool used by gift planning.
AdviZor	Dashboards for campaign management and prospect management.
AlumniFinder	Research tool used to identify and research potential donors, particularly related to their educational affiliations.
Crescendo	Financial tool used by gift planning to manage and facilitate planned donations.
DocuSign	Tool used to streamline process of securing electronic signatures on important documents including donation pledge forms, gift agreements, and waivers.
eTeam Sponsor	Peer-to-peer fundraising platform used by supporters to create their own fundraising campaigns.
EMMA	Email management platform providing personalization, segmentation, analytics, and automation options.
Encompass (iModules)	Encompass houses the main online giving page and is used by the alumni engagement team to engage donors and plan events (event registrations, contact information updates, and email campaigns from time to time). It is the only tool that successfully integrates with Banner at this time.
EverTrue	Fundraising data aggregation tool, which pulls primarily from Banner and public, online sources. Used to view donor data, to help identify prospects, and to provide engagement insights.
Foundation Directory (CANDID)	Prospecting and research tool for identifying and assessing potential grant-makers/foundation.
Fundriver	Fund management tool used by Finance to manage and track endowment and other restricted funds (Balance Pro)~~.~~
GiveCampus	Social/fundraising/online gift processing tool.
Gravity Forms	Tool to create online donation forms on the WordPress website. Moving away from use of this tool due to increased security protocols. Need a tool that provides encrypted forms.
Instrumentl	Grant (foundation) prospecting tool being explored by Research.
Legacy.com	Research tool used to validate deaths and identify and confirm familial relationships.
LexisNexis	Comprehensive research tool providing detailed donor data.
LinkedIn	Donor communication and research tool used to engage managed donors and verify constituent employment histories.
iWave	Research tool used to identify, evaluate, score and prioritize prospects and donors.
MailChimp	Mass email communication and analytics tool.
Databricks with Azure Datalake Storage (ADLS2)	Cloud-based, enterprise storage and analysis solution.
Microsoft Forms	Tool used by events team to gather registration, accommodation, and other pertinent information for events.
Microsoft Planner	Project management tool used by some on fundraising team as it is included in their Microsoft package.
Microsoft OneDrive, Outlook/Exchange, and SharePoint	Email, document management, and storage systems.
Mongoose (Mongoose Cadence)	Text messaging platform designed specifically for higher education institutions that allows fundraisers and the alumni team to engage with alumni, parents, and others through two-way SMS conversations.
OneCause	Event fundraising platform used by athletics and alumni teams.
PG Calc	Planned giving platform used to enhance future charitable giving.
Power BI	UNC Greensboro's primary visual reporting platform.
ProPublica	Research tool used to secure 990s and other financial documents on organizations.
Scholarship Universe	Scholarship management software used by the Advancement team to match recipients to scholarships and endowment reports.
Tableau	Reporting platform used by the alumni team to do engagement scoring.
Thankview	Personalized donor thank you video communications; now part of Evertrue.
TicketMaster	Digital ticketing system used by athletics.
UA Banner	An overlay for the development of custom reports and mail merged documents using data from Banner.
Vozzi	Texting platform used by athletics. It works through Ticketmaster to facilitate text messaging, marketing, and ticket purchases.
WebFOCUS	Primary reporting tool that is being used to enhance, supplement, and supplant reports that were previously done in UA Banner and Argos.
WordPress	Online tool used for event registration at smaller events. Since it cannot process payments, use Encompass for paid and larger event registrations.

1.4 TECHNOLOGY ECOSYSTEM



2.0 GENERAL INFORMATION

2.1 REQUEST FOR PROPOSAL DOCUMENT

This RFP is comprised of the base RFP document, any attachments, and any addenda released before Contract award, which are incorporated herein by reference. Proposals shall be submitted in accordance with the terms and conditions of this RFP.

2.2 NOTICE TO VENDORS REGARDING RFP TERMS AND CONDITIONS

It shall be the Vendor's responsibility to read the Instructions to Vendors, the North Carolina General Terms and Conditions, all relevant exhibits and attachments, and any other components made a part of this RFP and comply with all requirements and specifications herein. Vendors are also responsible for obtaining and complying with all Addenda and other changes that may be issued in connection with this RFP.

If Vendors have questions or issues regarding any component of this RFP, those must be submitted as questions in accordance with the instructions in the PROPOSAL QUESTIONS Section. If the University determines that any changes will be made as a result of the questions asked, then such decisions will be communicated in the form of an RFP addendum. The University may also elect to leave open the possibility for later negotiation of specific provisions of the Contract that have been addressed during the question-and-answer period, prior to contract award.

Other than through the process of negotiation under 01 NCAC 05B.0503, the University rejects and will not be required to evaluate or consider any additional or modified terms and conditions submitted with Vendor's proposal or otherwise. This applies to any language appearing in or attached to the document as part of the Vendor's proposal that purports to vary any terms and conditions or Vendors' instructions herein or to render the proposal non-binding or subject to further negotiation. Vendor's proposal shall constitute a firm offer that shall be held open for the period required herein ("Validity Period" above).

The University may exercise its discretion to consider Vendor proposed modifications. By execution and delivery of this RFP Response, the Vendor agrees that any additional or modified terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect, and will be disregarded unless expressly agreed upon through negotiation and incorporated by way of a Best and Final Offer (BAFO). Noncompliance with, or any attempt to alter or delete, this paragraph shall constitute sufficient grounds to reject Vendor's proposal as nonresponsive.

2.3 RFP SCHEDULE

The table below shows the *intended* schedule for this RFP. The University will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	University	April 29th, 2025
Submit Written Questions	Vendor	May 7th, 2025 no later than 12:00PM
Provide Response to Questions via Q&A Addendum	University	On or about May 9th, 2025
Submit Proposals via NC eVP	Vendor	May 30th, 2025 no later than 2:00PM
Virtual Bid Opening via MS Teams	University	May 30th, 2025 at 3:00PM Time: 3:00PM ET Microsoft Teams Meeting ID: 217 553 482 527 5 Microsoft Teams Passcode: Sy9sa2Q2 Call-In (Audio Only): +1 336-790-7381 Phone Conference ID: 524 232 353#
Invitations to Vendors for Demos issued	University	June 20th, 2025
Hold for CRM Demonstrations	Univ. / Vendor	July 14th, 2025 through August 1st, 2025
Contract Award / Start Date	University	On or about September 5th, 2025

2.4 PROPOSAL QUESTIONS

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions by the "Submit Written Questions" date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum.

Written questions shall be emailed to Anthony Kilar at *askilar@uncg.edu* by the date and time specified above. Vendors should enter "RFP # 69-2941 Questions" as the subject for the email. Question submittals should include a reference to the applicable RFP section and be submitted in the format shown below:

Reference	**Vendor Question**
RFP Section, Page Number	Vendor question …?

Questions received prior to the submission deadline date, the University's response, and any additional terms deemed necessary by the University will be made available in the form of an addendum. No information, instruction or advice provided orally or informally by any University personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. Vendors shall rely *only* on written material contained in the RFP and an addendum to this RFP.

2.5 PROPOSAL SUBMITTAL

IMPORTANT NOTE: This is an absolute requirement. Late bids, regardless of cause, will not be opened or considered, and will be automatically disqualified from further consideration. Vendor shall bear the sole risk of late submission due to unintended or unanticipated delay. It is the Vendor's sole responsibility to ensure its proposal has been received as described in this RFP by the specified time and date of opening. The time and date of receipt will be marked on each proposal when received. Any proposal or portion thereof received after the proposal deadline will be rejected.

Electronic Vendor Portal (eVP) Submission Instructions:

All proposal responses shall be submitted electronically via the electronic Vendor Portal (eVP). https://evp.nc.gov/ Additional information can be found at the eVP updates for Vendors link: https://eprocurement.nc.gov/news-events/evp-updates-vendors.

If confidential and proprietary information is included in the proposal, also submit one (1) signed, REDACTED copy of the proposal. Such information may include trade secrets defined by N.C. Gen. Stat. § 66-152 and other information exempted from the Public Records Act pursuant to N.C. Gen. Stat. §132- 1.2. Vendor may designate information, Products, Services or appropriate portions of its response as confidential, consistent with and to the extent permitted under the statutes and rules set forth above. By so redacting any page, or portion of a page, the Vendor warrants that it has formed a good faith opinion, having received such necessary or proper review by counsel and other knowledgeable advisors, that the portions determined to be confidential and proprietary and redacted as such, meet the requirements of the Rules and Statutes set forth above. However, under no circumstances shall price information be designated as confidential.

If the Vendor does not provide a redacted version of the proposal with its proposal submission, the Department may release an unredacted version if a record request is received.

Failure to submit a proposal in strict accordance with these instructions shall constitute sufficient cause to reject a Vendor's proposal(s). Vendors are strongly encouraged to allow sufficient time to upload proposals.

Critical updated information may be included in Addenda to this RFP. It is important that all Vendors responding to this RFP periodically monitor their email for any Addenda or other communications that may be issued prior to the bid opening date. All Vendors shall be deemed to have read and understood all information in this RFP and all Addenda thereto.

2.6 PROPOSAL CONTENTS

Vendors shall populate all attachments of this RFP that require the Vendor to provide information and include an authorized signature where requested. Failure to provide all required items, or Vendor's submission of incomplete items, may result in the University rejecting Vendor's proposal, in the University's sole discretion.

Vendor RFP responses shall include the following items and attachments, which shall be arranged in the following order:

a) Cover Letter, which must contain the following: (i) a statement that confirms that the Vendor has read the RFP in its entirety, including all links, and all Addenda released in conjunction with the RFP, (ii) a statement that the Vendor agrees to perform in accordance with the scope of work, requirements, and specifications contained herein; and (iii) Vendor's agreement to comply with all instructions, terms and conditions, and attachments.

b) Completed and signed version of all EXECUTION PAGES, along with the body of the RFP.

c) Signed receipt pages of any addenda released in conjunction with this RFP, if required to be returned.

d) Vendor's Proposal addressing all Specifications and Requirements in accordance with this RFP (See Section 5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK and Section 5.2 FUNCTIONAL & TECHNICAL REQUIREMENTS).

e) Completed version of ATTACHMENT A: Cost Proposal (Note: Attachment A is included for standardization. Responsive vendors are encouraged to provide the requested information in an alternate format, if preferred)

f) Completed version of ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

g) Completed version of ATTACHMENT E: CUSTOMER REFERENCE FORM

h) Completed version of ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

i) Completed and signed version of ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

j) Completed and signed version of ATTACHMENT H: TAXPAYER INFORMATION FORM

k) Completed and signed version of ATTACHMENT I: FUNCTIONAL AND TECHNICAL REQUIREMENTS

l) Completed and signed version of ATTACHMENT J: HECVAT SECURITY REVIEW

2.7 ALTERNATE PROPOSALS

Unless provided otherwise in this RFP, Vendor may submit alternate proposals for comparable Goods, various methods or levels of Service(s), or that propose different options. Alternate proposals must specifically identify the RFP requirements and advantage(s) addressed by the alternate proposal. Any alternate proposal, in addition to the marking described above, must be clearly marked with the legend: "Alternate Proposal # 69-2941 [for 'name of Vendor']". Each proposal must be for a specific set of Goods and Services and must include specific pricing. If a Vendor chooses to respond with various offerings, each must be offered with a separate price and be contained in a separate proposal document. Each proposal must be complete and independent of other proposals offered.

2.8 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Relevant definitions for this RFP are provided in 01 NCAC 05A .0112 and in the Instructions to Vendors found below which are incorporated herein by this reference.

3.0 METHOD OF AWARD AND PROPOSAL EVALUATION PROCESS

3.1 METHOD OF AWARD

North Carolina G.S. 143-52 provides a general list of criteria the State shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the University's best interest. All qualified proposals will be evaluated, and awards will be made to the Vendor(s) meeting the specific RFP Specifications and achieving the highest and best final evaluation, based on the criteria described in Section 3.4 EVALUATION CRITERIA.

While the intent of this RFP is to award a Contract(s) to a single Vendor, the University reserves the right to make separate awards to different Vendors for one or more line items, to not award one or more line items or to cancel this RFP in its entirety without awarding a Contract, if it is considered to be most advantageous to the University to do so.

The University reserves the right to waive any minor informality or technicality in proposals received.

3.2 CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION

From the date of issue, and while this RFP is under evaluation, the responding Vendor, including any subcontractors and suppliers, is prohibited from engaging in conversations intended to influence the outcome of the evaluation. See the Paragraph 29 of the Instructions to Vendors entitled COMMUNICTIONS BY VENDORS.

Each Vendor submitting a proposal to this RFP, including its employees, agents, subcontractors, suppliers, subsidiaries and affiliates, is prohibited from having any communications with any person inside or outside the using agency; issuing agency; other government agency office or body (including the purchaser named above, any department secretary, agency head, members of the General Assembly and Governor's office); or private entity, if the communication refers to the content of Vendor's proposal or qualifications, the content of another Vendor's proposal, another Vendor's qualifications or ability to perform a resulting contract, and/or the transmittal of any other communication of information that could be reasonably considered to have the effect of directly or indirectly influencing the evaluation of proposals, the award of a contract, or both.

Any Vendor not in compliance with this provision shall be disqualified from evaluation and award. A Vendor's proposal may be disqualified if its subcontractor and/or supplier engage in any of the foregoing communications during the time that the procurement is active (*i.e.*, the issuance date of the procurement until the date of contract award or cancellation of the procurement). Only those discussions, communications or transmittals of information authorized or initiated by the issuing agency for this RFP or inquiries directed to the purchaser named in this RFP regarding requirements of the RFP (prior to proposal submission) or the status of the award (after submission) are excepted from this provision.

3.3 PROPOSAL EVALUATION PROCESS

Only responsive submissions will be evaluated.

The University will conduct a One-Step evaluation of Proposals:

Proposals will be received according to the method stated in the Proposal Submittal Section above.

All proposals must be received by the issuing agency not later than the date and time specified in the RFP SCHEDULE Section above, unless modified by Addendum. Vendors are cautioned that this is a request for offers, not an offer or request to contract, and the University reserves the unqualified right to reject any and all offers at any time if such rejection is deemed to be in the best interest of the University.

At the date and time provided in the RFP SCHEDULE Section above, unless modified by Addendum, the proposal from each responding Vendor will be opened publicly and all offers (except those that have been previously withdrawn, or voided bids) will be tabulated. The tabulation shall be made public at the time it is created. When negotiations after receipt of bids is authorized pursuant to G.S. 143-49 and 01 NCAC 05B.0503, only the names of offerors and the Goods and Services offered shall be tabulated at the time of opening. If negotiation is anticipated, cost and price shall become available for public inspection at the time of the award.. Interested parties are cautioned that these costs and their components are subject to further evaluation for completeness and correctness and therefore may not be an exact indicator of a Vendor's pricing position.

At their option, the evaluators may request oral presentations or discussions with any or all Vendors for clarification or to amplify the materials presented in any part of the proposal. Vendors are cautioned, however, that the evaluators are not required to request presentations or other clarification—and often do not. Therefore, all proposals should be complete and reflect the most favorable terms available from the Vendor.

Upon completion of the evaluation process, the University will make award(s) based on the evaluation and notify the responsive vendors via email. Award of a Contract to one Vendor does not mean that the other proposals lacked merit, but that, all factors considered, the selected proposal was deemed most advantageous and represented the best value to the University.

The University reserves the right to negotiate with one or more vendors, or to reject all original offers and negotiate with one or more sources of supply that may be capable of satisfying the requirement, and in either case to require Vendor to submit a Best and Final Offer (BAFO) based on discussions and negotiations with the University.

3.4 EVALUATION CRITERIA

In addition to the general criteria in G.S. 143-52 which may or may not be relevant to this RFP, all qualified proposals will be evaluated, and award made based on considering the following criteria, to result in an award most advantageous to the University:

BEST VALUE: "Best Value" procurement methods are authorized by N.C.G.S. §§143-135.9 and 143B-1350(h). The award decision is made based on multiple factors, including: total cost of ownership, meaning the cost of acquiring, operating, maintaining, and supporting a product or service over its projected lifetime; the evaluated technical merit of the Vendor's offer; the Vendor's past performance; and the evaluated probability of performing the specifications stated in the solicitation on time, with high quality, and in a manner that accomplishes the stated business objectives and maintains industry standards compliance. The intent of "Best Value" procurement is to enable Vendors to offer and the Agency to select the most appropriate solution to meet the business objectives defined in the solicitation and to keep all parties focused on the desired outcome of a procurement.

A ranking method of source selection will be utilized in this procurement using evaluation criteria listed in order of importance in the Evaluation Criteria section below to allow the University to award this RFP to the Vendor(s) providing the Best Value and recognizing that Best Value may result in award other than the lowest price or highest technically qualified offer. By using this method, the overall ranking may be adjusted up or down when considered with, or traded-off against, other non-price factors.

EVALUTION METHOD: Narrative and by consensus of the evaluating committee, explaining the strengths and weaknesses of each proposal and why the recommended awardee(s) provide the best value to the University.

All qualified proposals will be evaluated, and award made based on considering the following criteria listed in descending order of importance, to result in an award most advantageous to the University:

1. **Vendor Experience & Qualifications** – Evaluation of the Vendor’s technical capabilities, relevant experience, project approach, company reputation, customer references, financial stability, compliance with RFP and product requirements, team qualifications, support services, security protocols, and overall fit for the project.
2. **General Product Overview** – Evaluation of the product’s quality and usability, customer feedback, mobile interface, built-in data quality and security tools, and overall ability to meet core requirements, create efficiencies, and drive fundraising effectiveness.
3. **CRM Functionality** – Evaluation of solution’s ability to deliver efficient, intuitive data entry and access, in the following functional areas of the CRM as exhibited through the vendor’s proposal and live demonstration, if determined necessary:
   - Constituent (BioDem) Management
   - Memberships
   - Marketing and Communications
   - Alumni Engagement: Event and Volunteer Management
   - Donor Relations and Stewardship
   - General Reporting
   - Gift Management
   - Annual Giving/Campaign Management
   - Prospect Development
   - Major Giving
   - Reports, Dashboards, and Analytics
   - Architecture and Integrations
4. **Pricing** – Evaluation of the total anticipated cost of ownership, including but not limited to the complete financial cost of acquiring, deploying, maintaining, and supporting the CRM over its entire lifecycle, encompassing not only the initial license costs but also the ongoing expenses related to personnel needed to operate and manage it, including training, support, and administrative staff costs.
5. **Ability to Deliver Against Requirements and Specifications** – The Requirements and Specifications are detailed in the respective sections below. The University does not expect or require that a single solution meet all of the requirements and specifications; however, Vendor is required to indicate whether their solution meets the requirements and specifications “out of the box,” meets the requirements and specifications with configuration, will meet the requirements and specifications in a future release, or does not meet the requirements and specifications.

3.5 PERFORMANCE OUTSIDE THE UNITED STATES

Vendor shall complete ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR. In addition to any other evaluation criteria identified in this RFP, the University may also consider, for purposes of evaluating proposed or actual contract performance outside of the United States, how that performance may affect the following factors to ensure that any award will be in the best interest of the University:

a) Total cost to the University
b) Level of quality provided by the Vendor
c) Process and performance capability across multiple jurisdictions
d) Protection of the University's information and intellectual property
e) Availability of pertinent skills
f) Ability to understand the University's business requirements and internal operational culture
g) Particular risk factors such as the security of the University's information technology
h) Relations with citizens and employees
i) Contract enforcement jurisdictional issues

3.6 INTERPRETATION OF TERMS AND PHRASES

This RFP serves two functions: (1) to advise potential Vendors of the parameters of the solution being sought by the University; and (2) to provide (together with other specified documents) the terms of the Contract resulting from this procurement. The use of phrases such as "shall," "must," and "requirements" are intended to create enforceable contract conditions. In determining whether proposals should be evaluated or rejected, the University will take into consideration the degree to which Vendors have proposed or failed to propose solutions that will satisfy the University's needs as described in the RFP. Except as specifically stated in the RFP, no one requirement shall automatically disqualify a Vendor from consideration. However, failure to comply with any single requirement may result in the University exercising its discretion to reject a proposal in its entirety.

4.0 REQUIREMENTS

This Section lists the requirements related to this RFP. By submitting a proposal, the Vendor agrees to meet all stated requirements in this Section as well as any other specifications, requirements, and terms and conditions stated in this RFP. If a Vendor is unclear about a requirement or specification, or believes a change to a requirement would allow for the University to receive a better proposal, the Vendor is urged to submit these items in the form of a question during the question and answer period in accordance with the Proposal Questions Section above.

4.1 PRICING

Proposal price shall constitute the total cost to the University for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, transportation, administrative and other similar fees. Complete ATTACHMENT A: COST PROPOSAL and include in Vendor's proposal. The pricing provided in ATTACHMENT A, or resulting from any negotiations, is incorporated herein and shall become part of any resulting Contract.

Note: Attachment A is included for standardization. Responsive vendors are encouraged to provide the requested information in an alternate format, if preferred.

Pricing details should include the following:

- Itemized breakdown of all costs associated with licensing the CRM software, implementing the system, and maintaining ongoing support and services.
- Clear distinctions between one-time costs (e.g., setup fees, customization charges) and recurring costs (e.g., subscription fees, annual maintenance fees).
- Options for different pricing tiers or packages, along with descriptions of what each tier includes and any additional services or features available at extra cost.

- Transparent pricing models, such as per-user licensing, volume discounts, or tiered pricing based on usage or functionality, with explanations of pricing rationale and value proposition.
- Listing of any optional third-party technical implementation partner costs including:
  - Breakdown of costs associated with engaging third-party technical vendors or implementation partners for services such as system integration, data migration, customization, or specialized technical expertise.
- Description of services provided by the third-party vendors, along with their qualifications, experience, and track record in implementing CRM systems or similar projects for Higher Education organizations.
  - Pricing structure for third-party services, including hourly rates, project-based fees, or retainer agreements, with estimates of total costs based on anticipated scope of work and project requirements.
  - Information on any contractual agreements or service-level commitments between the vendor and third-party vendors, including terms and conditions for coordination, collaboration, and accountability throughout the implementation process.

4.2 INVOICES

Vendor shall invoice the Purchasing Agency. The standard format for invoicing shall be Single Invoices meaning that the Vendor shall provide the Purchasing Agency with an invoice for each order. Invoices shall include detailed information to allow Purchasing Agency to verify pricing at point of receipt matches the correct price from the original date of order. The following fields shall be included on all invoices, as relevant:

Vendor's Billing Address, Customer Account Number, NC Contract Number, Order Date, Buyer's Order Number, Manufacturer Part Numbers, Vendor Part Numbers, Item Descriptions, Price, Quantity, and Unit of Measure.

INVOICES MAY NOT BE PAID UNTIL AN INSPECTION HAS OCCURRED AND THE GOODS OR SERVICES ACCEPTED.

4.3 DELIVERY

Delivery shall not be considered to have occurred until implementation has been completed and the Goods are approved as acceptable by the Contract Administrator.

4.4 AUTHORIZED PARTNER

The Vendor shall be authorized by the manufacturer to distribute or resell the products and/or maintenance offered in this RFP. The Vendor shall provide a signed statement from the manufacturer confirming authorization upon request from the agency. Failure to provide this statement shall constitute sufficient grounds for rejection of Vendor's offer, at the discretion of the State.

Authorized: ☐ YES ☐ NO **Attached Manufacturer's Authority:** ☐ YES ☐ NO

4.5 DEMONSTRATION

Vendor shall be capable of demonstrating proposed solution during the days specified in Section 2.4 RFP SCHEDULE after notification to do so, at no additional cost to the State. If required, this will be a comprehensive demonstration at a site designated by the State with hands-on participation by agency operator(s) if necessary or appropriate. Failure of Vendor or their authorized representative to perform a satisfactory demonstration (if requested) in accordance with these requirements shall be a sufficient basis for rejection of the proposal. The results of such demonstration will be considered in the evaluation and award of a contract.

4.6 FINANCIAL STABILITY

As a condition of contract award, the Vendor must certify that it has the financial capacity to perform and to continue to perform its obligations under the Contract; that Vendor has no constructive or actual knowledge of an actual or potential legal proceeding being brought against Vendor that could materially adversely affect performance of this Contract; and that entering into this Contract is not prohibited by any contract, or order by any court of competent jurisdiction.

Each Vendor shall certify it is financially stable by completing ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION. The University is requiring this certification to minimize potential issues from contracting with a Vendor that is financially unstable. From the date of the Certification to the expiration of the Contract, the Vendor shall notify the University within thirty (30) days of any occurrence or condition that materially alters the truth of any statement made in this Certification. The Contract Manager may require annual recertification of the Vendor's financial stability.

4.7 HUB PARTICIPATION

Pursuant to North Carolina General Statute G.S. 143-48, it is State policy to encourage and promote the use of small, minority, physically handicapped, and women contractors in purchasing Goods and Services. As such, this RFP will serve to identify those Vendors that are minority owned or have a strategic plan to support the State's Historically Underutilized Business program by meeting or exceeding the goal of 10% utilization of diverse firms as 1st or 2nd tier subcontractors. Vendor shall complete ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION.

4.8 VENDOR EXPERIENCE

In its Proposal, Vendor shall demonstrate experience with public and/or private sector clients with similar or greater size and complexity to the University. Vendor shall provide information as to the qualifications and experience of all executive, managerial, legal, and professional personnel to be assigned to this project, including resumes citing experience with similar projects and the responsibilities to be assigned to each person.

- Include an overview of the vendor's experience in implementing CRM systems, specifically within the context of philanthropy organizations or similar sectors.
- Provide a detailed description of previous CRM implementation projects, including the scale, scope, and duration of implementation, highlighting any successful deployments relevant to fundraising or nonprofit organizations.
- Include details on the methodologies and best practices employed during CRM implementations, demonstrating expertise in delivering tailored solutions to meet client needs.

4.9 REFERENCES

Vendors shall provide at least three (3) references, using ATTACHMENT E: CUSTOMER REFERENCE FORM, for which your company has supplied the exact model of equipment offered and which can provide insights into their experience working with the vendor, including the effectiveness of the CRM solution, level of customer support, and overall satisfaction with the partnership. Preference for references to be regional comprehensive institutions like UNCG with Banner as their legacy system and similar advancement staffing levels. The State shall contact these users to determine the quality level of the offered equipment; as well as, but not limited to user satisfaction with Vendor performance. Information obtained shall be considered in the evaluation of the proposal.

4.10 VENDOR'S REPRESENTATIONS

If Vendor's Proposal results in an award, Vendor agrees that it will not enter any agreement with a third party that may abridge any rights of the University under the Contract. If any Services, deliverables, functions, or responsibilities not specifically described in this solicitation are required for Vendor's proper performance, provision and delivery of the Service and deliverables under a resulting Contract, or are an inherent part of or necessary sub-task included within such Service, they will be deemed to be implied by and included within the scope of the Contract to the same extent and in the same manner as if specifically described in the Contract. Unless otherwise expressly provided herein, Vendor will furnish all of its own necessary management, supervision, labor, facilities, furniture, computer and telecommunications equipment, software, supplies and materials necessary for the Vendor to provide and deliver the Services and/or other Deliverables.

4.11 AGENCY INSURANCE REQUIREMENTS MODIFICATION

A. Default Insurance Coverage from the General Terms and Conditions applicable to this Solicitation:

☐ Contract value in excess of $1,000,000.00

5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK

5.1 GENERAL

Challenges/System Limitations

UNCG has been using Banner as its primary Advancement database since 2007. Currently, there are approximately 722,000 constituent records and 609,000 gift records. Banner lacks the modern functionality needed to compete in an increasingly competitive fundraising environment and the user interface which staff expect. While it remains the central source of truth for the UNCG University Advancement Office, staff have adopted a network of other software, work-around processes, and shadow databases to meet day-to-day business needs, resulting in an inconsistent and unsustainable array of fragmented data. Data is difficult to access and transferred from one system to another through flat files or through duplicate data entry, leading to missed or mis-entered data. None of the individual systems provide fundraisers full, 360-degree insight into their donors. As UNCG sets its own goals to support the bold direction of the University, we require a modern system to reflect the modern practices needed to take us into the future.

Expected Benefits/Outcomes

To accomplish the vision of realizing a modern, robust fundraising CRM environment capable of fully supporting development needs and fostering sustainable growth, UNCG is seeking a partner who can deliver against critical success factors, including:

- A CRM and vendor partner that offers innovative solutions, is adaptive to industry change, and holds donor security to the highest standards and controls.
- A highly engaging and intuitive user interface that helps drive user adoption and encourages end users to leverage the system for their work.
- A solution that supports both complex and on-demand reporting, analytics, predictive modeling, and enables reliable decision-making.
- A solution that provides options for end-to-end fundraising functionality through native or well-tested partner applications with the ability to seamlessly integrate with third-party systems as well as internal custom solutions.
- A solution that delivers configurable and comprehensive role-based security (RBS) throughout the system.
- A solution that provides thoughtful integration of AI to drive staff efficiency while supporting a personalized alumni engagement strategy.
- The information gathered from this RFP will identify qualified vendors who can assist the UNCG Advancement Office in reaching its goals.

Expected System Go-Live

UNCG expects to start implementation in 2026 and is targeting a 2027 go-live.

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.

Implementation Partner

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.

5.2 SPECIFICATIONS & REQUIREMENTS

The following functional and technical requirements will be taken into consideration in evaluating the CRM. UNCG does not expect or require that a single solution meets all the requirements; however, Vendor is required to indicate in ATTACHMENT I: FUNCTIONAL AND TECHNICAL REQUIREMENTS whether their solution meets the requirement "out of the box," meets the requirement with configuration, will meet the requirement in a future release, or does not meet the requirement.

Functional and Technical Requirements

5.2.1 Activities/Tasks

- Automatically copy activity record (e.g., contact reports) to records of all constituents included in activity.
- Create, assign, and send notifications and alerts for activities and tasks.
- Log integrated social media texts and other communications (e.g., LinkedIn, What's App).
- Offer standard and customizable fields and tools to track and report on activity details by type (e.g., call, email, text, visit).
- Provide in-application omnichannel (e.g., phone, text, email, mail, social media) marketing, engagement, and communication options.
- Tag activities and tasks to facilitate segmentation and searching capabilities.
- View upcoming and overdue tasks on personalized dashboards.

5.2.2 Affiliations/Relationships

- Automate reciprocal relationship and affiliation record creation.
- Create visual representations of relationships and affiliations.
- Identify affiliations and relationships between organizations, people, and organizations and people.

5.2.3 Constituent Management

- Act as the single source of truth for the advancement team.
- Create constituent records without requiring mailing address.
- Deliver automated contact (address, email, phone, and social media handles) verification.
- Facilitate deceasing process through appropriate built-in fields, page layout, automations, and use of AI to identify potential constituents for verification.
- Include the option to display constituent photo on profile page.
- Make easy householding options available to bring constituent records together or separate them, while maintaining giving, contact, and activity data on appropriate individual records.
- Identify organization hierarchies and offer reporting options that aggregate data at any level of the hierarchy.
- Make standard and customized fields available to track donor research, including wealth ratings and other prioritization metrics.
- Notify gift officers when their donors reach defined milestones (society membership levels, athletic point levels, etc.).
- Permit multiple "current" contacts of the same type, dating seasonal contact data and tagging different contact information of the same type for use with different people/for different purposes, etc.
- Provide 360-degree view of constituents, compiling data from all areas of the university.
- Self-select to receive notifications when I am a team member or owner of a record that gets modified.
- Track, manage, and report on current and historic contact data, including time stamping and recording user's name when changes are made.

5.2.4 Data Quality

- Offer standard and customizable required fields.
- Perform automated data quality checks based on custom criteria (e.g., different gift officers assigned to people in the same household).
- Provide full range of data quality tools, including those to aid data validation and deduplication.
- Supply data audits and historical data tracking capabilities.

5.2.5 Document Management

- Allow options to generate documents from templates in pdf PDF or editable (e.g., Word) format to provide editing options.
- Create or upload and store contact reports, proposals, and donor profiles on specific records.
- Permit users to upload and attach documents or include live links to documents in a shared storage area.
- Provide standard and customizable mail and email templates with field merge capabilities that can be saved, stored, and edited.
- Upload bulk, individual documents at one time and attach to specified records.
- Upload gift processing documentation and make them easily accessible from the gift record.

5.2.6 Engagement

- Automate contact reports based on activity entries.
- Create and track digital journey mapping based on defined time cadences and/or actions of constituent.
- Filter and segment constituents based on variety of criteria, including--but not limited to--relationship to the university, volunteer interests, award recipients, funding interests, school attended, employment, giving history, class year and/or participation in athletics, clubs, performing arts, and/or other group activities.
- Outline and track success of moves management strategies.
- Provide social media plug-ins and metrics.
- Record engagement details, including email and text results, for use in analysis and creation of automated prospect/donor journeys.
- Send manual and bulk emails, texts, and other communications based on protocols and permissions established by university.
- Supply peer-to-peer fundraising tools and tracking.
- Track, create, flag and automate nuanced communication preferences (exclusion rules) based on individualized constituent needs.

5.2.7 Fund Management

- Designate, manage, and report on gift funds in near-real time.
- Generate reports on funds for donors using stored templates.
- Provide donor fund information and history on a consolidated page.

5.2.8 Gift Administration

- Allow multiple manual and automated ways to soft credit donors and influences, in addition to providing separate fundraiser credit to one or more staff involved in the gift.
- Deliver user-friendly options for making gift adjustments.
- Enhance online giving experience by simplifying the input requirements, designation selection, and payment options.
- Furnish appropriate fields and page layouts to process and administer the full variety of planned, property, and cash pledges, matches, and donations, as well as appropriate crediting for IRS-compliant receipting.
- Offer restricted online giving pages for pledge and fund payments.
- Offer standard and customizable acknowledgement, receipt, and pledge reminder templates with field merge capabilities that can be saved, stored, and edited.
- Provide flexible online processing options that accept and appropriately segment, process, tax, allocate, and receipt funds based on supporter selections (e.g., ability to manage a single purchase that includes reunion registrations, event tickets, merchandise purchases, and donations).
- Support flexibility in pledge/gift commitment arrangements, including holds, write-offs, changes to payment amounts and schedules, as well as distinguishing between formal (legal binding) pledges, conditional pledges, and informal (non-legally binding) gift commitments.

5.2.9 Integrations

- Deliver robust, reliable integration options for top fundraising solutions, including those in use and under consideration for use.
- Expedite the transfer of student, parent, and financial data from the campus' other systems.
- Integrate easily with leading analytics and reporting tools, including WebFOCUS and Power BI.
- Integrate easily with Banner, which will remain the core financial and student information system.
- Offer a variety of data append options, including wealth ratings and demographic data.

5.2.10 Management of Projects, Events, Campaigns, and Volunteers

- Allow registration and check-in options by phone.
- Automate creation of activities on records for large mailings/emails, including for campaigns and events.
- Automate notification and level adjustments when constituents attain defined membership and/or society levels.
- Evaluate ROI of projects, events, volunteer activities, and campaigns.
- Generate, filter, and pull event, volunteer, and campaign lists.
- Include geo-coding features to help with travel, event planning, volunteer recruitment, and donor assignments based on specific areas.
- Manage complex, tiered projects, campaigns, and volunteer opportunities.
- Offer built-in basic and supplemental, integrated tools for project, event, campaign, and volunteer management.
- Offer options for records owners to be notified when a constituent RSVPs and/or checks in at an event.
- Provide customizable tables/objects to track membership benefit details, including requirements and deliverables.
- Tag and track volunteers and event participants to determine if later become donors.
- Tag gifts associated with specific events, volunteer activities, and campaigns.
- Track and report on the full variety of event, volunteer, and campaign participation.
- Track, manage, and report on members of athletic and giving societies.

5.2.11 Portfolio Management

- Assign and identify team role to university-wide members of the constituent relationship management team.
- Create and track constituent relationship management team communications on constituent records.
- Establish and visually track moves management progress within donor records.
- Track via dashboards and/or alerts when portfolio actions required (e.g., when pledges are coming to an end).

5.2.12 Process Optimization

- Automate creation of documents, including contact report summary, donor profiles, proposals, receipts, and acknowledgements.
- Create automated notifications, alerts, and tasks (required actions) based on organization-defined criterion.
- Define and track approval and other staged processes.
- Deliver increased efficiencies through standard and custom automations, workflows, and quick actions.
- Offer user-defined options for alerts and notifications.
- Provide multiple options for filtering and visualizing lists.
- Provide process to track and validate changes made to allow more people to make updates in a timely manner, while controlling quality.
- Track time in approval, fundraising, and other defined stages.

5.2.13 Prospect Management

- Manage and prioritize prospects in queue for assignment.
- Offer potential for users to drill into data behind constituent scoring metrics.
- Provide predictive modeling opportunities.
- Provide prospect analysis and identification tools.
- Provide standard and custom rating capabilities.

5.2.14 Reporting, Analytics, and AI

- Create, run, and save near real-time reports.
- Aggregate giving summaries in multiple ways with a high degree of accuracy.
- Automatically distribute reports based on a variety of scheduling options.
- Furnish both dynamic (personalized) vs. static (same for all) reports and dashboards.
- Leverage AI to spot hidden potential through identification of such things as trends, giving and research opportunities, board membership potential, and engagement needs.
- Offer options for data visualization.
- Provide leading edge built-in tools for data analytics.
- Provide personalized dashboards based on roles and assigned metrics.
- Self-generate and filter standard prospect lists and reports based on defined criterion and security parameters.
- Tag, generate, and save both private and public reports.

5.2.15 Security

- Define security parameters in a variety of ways, including—but not limited to—organizational hierarchy, functional role within organization, and functional role within constituent's relationship management team.
- Deliver enhanced security features, including ability to define limitations based on time and location.
- Offer appropriate levels of access to partners and constituent management team members across the campus.
- Provide options to customize access for certain staff or groups of staff based on defined parameters.

5.2.16 Specialized Features

- Allow entry, use, and reporting of foreign and special characters in name and contact fields.
- Include calendaring functionality and integrations.
- Offer opportunities to establish self-service portals for defined groups of constituents, including alumni, donors, volunteers, etc.
- Provide supporters opportunities to generate documents (fund reports, receipts, confirmations, etc.), update their contact and demographic data, register for events, unsubscribe to mailings/emailings, etc., through their secure portal.
- Pin comments and notes on records.
- Provide an in-system knowledge management location for storage of job aides and other training documentation.
- Provide audio clip field to record correct phonetic pronunciation of names.
- Provide mobile app with ability to access, enter, and manage all key user and admin functionality, including security settings.
- Provide personalization features for individual users.

5.2.17 System

- Deliver easy and reliable bulk upload, update, and delete functionality.
- Deliver streamlined data entry options and a simple user interface.
- Offer customizable page layouts to better surface data based on user roles and needs.
- Offer reliable base-level and advanced search capabilities.
- Provide robust search capabilities on free text fields.
- Offer testing environments.
- Offer auto-complete options for searches and street addresses.
- Pair coding and description fields to ensure understanding by all users.
- Provide consolidated standard page layouts based on data being entered.
- Support no and low code customization and administration options.

5.2.18 Training/Support

- Offer omnichannel support services during the university's primary business hours.
- Provide hands-on, role-based training and support options.
- Provide multiple training forums and formats to meet differing learning styles.

5.3 HECVAT SECURITY REVIEW

The HECVAT4 (Higher Education Community Vendor Assessment Toolkit) is a tool designed specifically for colleges and universities to assess vendor security. It is lengthy but provides the benefit of the Vendor being able to maintain and reuse it for future proposals (see Higher Education Community Vendor Assessment Toolkit). Here's how to complete the assessment:

- Begin with the START HERE tab of the HECVAT file (ATTACHMENT K: HECVAT4). Your answers to the Required questions (REQU-01 - REQU-08) will provide guidance on which part of the remaining worksheets apply to your product or service. You must complete all questions that apply to your solution.
- Once you have completed the "START HERE" tab, you must also complete the "Organization" tab and any other questions that apply to your solution.
- Because the HECVAT applies to your solution instead of any specific college or university, you can share it with as many potential customers as needed without the need to make changes.
- You DO NOT need to complete any of the tabs with an "evaluation" title. The institution will use those tabs to compare your answers to their own policies and appetite for risk.
- If necessary, the institution can make notes and ask questions that will appear in the "Analyst Notes" column during their review, allowing you to easily add more information when requested.

5.4 ADDITIONAL SUBMISSION INFORMATION

Please assist us by providing the following:

- Privacy Policy
- Service Level Agreement(SLA)
- Terms of Service

Please provide any assurance documents you have, such as:

- Service Organization Controls SOC2 Type 2
- Service Organization Controls SOC3
- HITRUST
- International Standards of Assurance Engagements ISAE 3402
- ISO/IEC 27017
- StateRamp
- FedRamp

If applicable, please provide the following:

- 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)

5.5 PHASED APPROACH

Vendor's proposal shall include, in narrative, outline, and/or graph form of the Vendor's approach to providing the deliverables outlined in Section 5.0 PRODUCT SPECIFICATIONS AND SCOPE OF WORK of this RFP through a phased approach to implementation as follows. A description of each task and deliverable and the schedule for accomplishing each shall be included.

6.0 CONTRACT ADMINISTRATION

All Contract Administration requirements are conditioned on an award resulting from this solicitation. This information is provided for the Vendor's planning purposes.

6.1 CONTRACT MANAGER AND CUSTOMER SERVICE

The Vendor shall be required to designate and make available to the University a contract manager and customer service point(s) of contact. The contract manager shall be the University's point of contact for Contract related issues and issues concerning performance, progress review, scheduling, and service. The customer service point of contact shall be the University's point of contact for customer service-related issues.

	Contract Manager Point of Contact	Customer Service Point of Contact
Name:		
Office Phone #:		
Mobile Phone #:		
Email:		

6.2 POST AWARD PROJECT REVIEW MEETINGS

The Vendor, at the request of the University, may be required to meet weekly with the University for Project Review meetings. The purpose of these meetings will be to review project progress reports, discuss Vendor and University performance, address outstanding issues, review problem resolution, provide direction, evaluate continuous improvement and cost saving ideas, and discuss any other pertinent topics.

6.3 CONTINUOUS IMPROVEMENT

The University encourages the Vendor to identify opportunities to reduce the total cost the University. A continuous improvement effort consists of various ways to enhance business efficiencies as performance progresses.

6.4 PERIODIC MONTHLY STATUS REPORTS

The Vendor shall be required to provide Management Reports to the designated Contract Lead on a monthly basis. This report shall include, at a minimum, information concerning the work accomplished during the reporting period; work to be accomplished during the subsequent reporting period; problems, real or anticipated, and notification of any significant deviation from previously agreed upon work plans, schedules, and budget. These reports shall be well organized and easy to read. The Vendor shall submit these reports electronically using the format required by the Purchasing Agency. The Vendor shall submit the reports in a timely manner during regularly scheduled leadership meetings as agreed by the parties.

6.5 ACCEPTANCE OF WORK

Performance of the work and/or delivery of Goods shall be conducted and completed at least in accordance with the Contract requirements and recognized and customarily accepted industry practices. Performance shall be considered complete when the Services or Goods are approved as acceptable by the Contract Administrator.

Acceptance of work products shall be based on the following criteria:

- Completion and acceptance of all product testing as designed by the Vendor and agreed upon by the State, acknowledging satisfactory end-to-end system performance.
- Completion of all Project Tasks defined by the Vendor and agreed upon by the State in the final, approved Project Workplan.

The University shall have the obligation to notify Vendor, in writing ten (10) calendar days following completion of such work or delivery of a deliverable described in the Contract that it is not acceptable. The notice shall specify in reasonable detail the reason(s) it is unacceptable. Acceptance by the University shall not be unreasonably withheld; but may be conditioned or delayed as required for reasonable review, evaluation, installation, or testing, as applicable to the work or deliverable. Final acceptance is expressly conditioned upon completion of all applicable assessment procedures. Should the work or deliverables fail to meet any specifications, acceptance criteria or otherwise fail to conform to the Contract, the University may exercise any and all rights hereunder, including, for Goods deliverables, such rights provided by the Uniform Commercial Code, as adopted in North Carolina.

6.6 TRANSITION ASSISTANCE

If a Contract results from this solicitation, and the Contract is not renewed at the end of the last active term, or is canceled prior to its expiration, for any reason, Vendor shall provide transition assistance to the University, at the option of the University, for up to six (6) months to allow for the expired or canceled portion of the Services to continue without interruption or adverse effect, and to facilitate the orderly transfer of such Services to the University or its designees. If the University exercises this option, the Parties agree that such transition assistance shall be governed by the terms and conditions of the Contract (notwithstanding this expiration or cancellation), except for those Contract terms or conditions that do not reasonably apply to such transition assistance. The University shall agree to pay Vendor for any resources utilized in performing such transition assistance at the most current rates provided by the Contract for performance of the Services or other resources utilized.

6.7 DISPUTE RESOLUTION

During the performance of the Contract, the parties agree that it is in their mutual interest to resolve disputes informally. Any claims by the Vendor shall be submitted in writing to the University's Contract Manager for resolution. Any claims by the University shall be submitted in writing to the Vendor's Project Manager for resolution. The Parties shall agree to negotiate in good faith and use all reasonable efforts to resolve such dispute(s).

During the time the Parties are attempting to resolve any dispute, each shall proceed diligently to perform their respective duties and responsibilities under this Contract. The Parties will agree on a reasonable amount of time to resolve a dispute. If a dispute cannot be resolved between the Parties within the agreed upon period, either Party may elect to exercise any other remedies available under the Contract, or at law. This provision, when agreed in the Contract, shall not constitute an agreement by either party to mediate or arbitrate any dispute.

6.8 CONTRACT CHANGES

Contract changes, if any, over the life of the Contract shall be implemented by contract amendments agreed to in writing by the University and Vendor. Amendments to the contract can only be through the contract administrator.

7.0 ATTACHMENTS

IMPORTANT NOTICE

RETURN THE REQUIRED ATTACHMENTS WITH YOUR RESPONSE

FOLLOW THE LINKS TO ACCESS EACH ATTACHMENT

ATTACHMENT A: COST PROPOSAL

Complete and return the Cost Proposal associated with this RFP, which can be found in the table below:

ATTACHMENT B: INSTRUCTIONS TO VENDORS

The Instructions to Vendors, which are incorporated herein by this reference, may be found here:

https://ncadmin.nc.gov/formnorth-carolina-instructions-vendors032023/download?attachment

ATTACHMENT C: NORTH CAROLINA DIT TERMS & CONDITIONS

The North Carolina DIT SaaS Terms and Conditions, which are incorporated herein by this reference, may be found here:

https://it.nc.gov/documents/files/saas-terms-conditions-2019-05-06/open

ATTACHMENT D: HUB SUPPLEMENTAL VENDOR INFORMATION

Complete and return the HUB Vendor Information form, which can be found at the following link:
https://www.doa.nc.gov/pandc/onlineforms/form-hub-supplemental-vendor-information-9-2021/download

ATTACHMENT E: CUSTOMER REFERENCE FORM

Complete and return the Customer Reference Form, which can be found at the following link:
https://ncadmin.nc.gov/media/15503/open

ATTACHMENT F: LOCATION OF WORKERS UTILIZED BY VENDOR

Complete and return the Location of Workers Utilized by Vendor, which can be found at the following link:

https://www.doa.nc.gov/pandc/onlineforms/form-location-workers-09-2021/download

ATTACHMENT G: CERTIFICATION OF FINANCIAL CONDITION

Complete, sign, and return the Certification of Financial Condition, which can be found at the following link:

https://www.doa.nc.gov/pandc/onlineforms/form-certification-financial-condition-09-2021/download

ATTACHMENT H: TAXPAYER INFORMATION FORM

Complete, sign, and return the Taxpayer Information Form, which can be found at the following link:
https://accountspayable.uncg.edu/wp-content/uploads/UNCG-Taxpayer-Information-Form-Revision-03.22.2023.pdf

ATTACHMENT I: FUNCTIONAL AND TECHNICAL REQUIREMENTS CHECKLIST

Complete and return the requirements checklist associated with this RFP, which can be found in the attachment below:

ATTACHMENT J: HECVAT SECURITY REVIEW

Complete and return the HECVAT Security review, which can be found in the attachment below:

Failure to Return the Required Attachments May Eliminate Your Response from Further Consideration

ATTACHMENT A: COST PROPOSAL

Note: Attachment A is included for standardization. Responsive vendors are encouraged to provide the requested information in an alternate format, if preferred.

Pricing details should include the following:

- Itemized breakdown of all costs associated with licensing the CRM software, implementing the system, and maintaining ongoing support and services.
- Clear distinctions between one-time costs (e.g., setup fees, customization charges) and recurring costs (e.g., subscription fees, annual maintenance fees).
- Options for different pricing tiers or packages, along with descriptions of what each tier includes and any additional services or features available at extra cost.

One Time Cost Component	One-Time Fees and Year One (1) of Operation	Notes
Project Management	$	
Customization, Development or First Time Engineering fees required for implementation	$	
Project Deliverables and User Documentation	$	
Testing Costs	$	
Installation / Conversion / Migration Costs		
Training for users and staff (including all time and training materials)	$	
	$	
	$	
	$	
Total One-Time Cost -Year 1:	**$**	

Cost Component	RECURRING COSTS			
	Year 2	**Year 3**	**Year 4**	**Year 5**
Subscription Fees	$	$	$	$
Licensing Fees	$	$	$	$
Software Maintenance Fees	$	$	$	$
Enhancement Costs	$	$	$	$
Technical Support / Customer Service	$	$	$	$
Others (describe)				
Total Recurring Costs:	**$**	**$**	**$**	**$**

Grand Total Price for Entire Contract (One Time Costs Plus 4 Years of Operation):	$

ATTACHMENT I: FUNCTIONAL & TECHNICAL REQUIREMENTS

Vendor to indicate whether their proposed solution meets the requirement “out of the box,” meets the requirement with configuration, will meet the requirement in a future release, or does not meet the requirement. Please reference subsections in Section 5.2 for additional information regarding individual criteria for Functional & Technical Requirements.

Functional & Technical Requirement (Section 5.2)	Meets Requirements “Out of the Box”	Meets Requirement with Configuration	Does Not Meet Requirement
Activities / Tasks (5.2.1)			
Affiliations / Relationships (5.2.2)			
Constituent Management (5.2.3)			
Data Quality (5.2.4)			
Document Management (5.2.5)			
Engagement (5.2.6)			
Fund Management (5.2.7)			
Gift Administration (5.2.8)			
Integrations (5.2.9)			
Management of Projects, Events, Campaigns and Volunteers (5.2.10)			
Portfolio Management (5.2.11)			
Process Optimization (5.2.12)			
Prospect Management (5.2.13)			
Reporting, Analytics and AI (5.2.14)			
Security (5.2.15)			
Specialized Features (5.2.16)			
System (5.2.17)			
Training / Support (5.2.18)			

ATTACHMENT J: HECVAT SECURITY REVIEW

The HECVAT4 (Higher Education Community Vendor Assessment Toolkit) is a tool designed specifically for colleges and universities to assess vendor security. It is lengthy but provides the benefit of the Vendor being able to maintain and reuse it for future proposals (see Higher Education Community Vendor Assessment Toolkit). Here's how to complete the assessment:

- Begin with the START HERE tab of the HECVAT file (ATTACHMENT J: HECVAT4). Your answers to the Required questions (REQU-01 - REQU-08) will provide guidance on which part of the remaining worksheets apply to your product or service. You must complete all questions that apply to your solution.
- Once you have completed the "START HERE" tab, you must also complete the "Organization" tab and any other questions that apply to your solution.
- Because the HECVAT applies to your solution instead of any specific college or university, you can share it with as many potential customers as needed without the need to make changes.
- You DO NOT need to complete any of the tabs with an "evaluation" title. The institution will use those tabs to compare your answers to their own policies and appetite for risk.
- If necessary, the institution can make notes and ask questions that will appear in the "Analyst Notes" column during their review, allowing you to easily add more information when requested.

For convenience, a link to the Excel version of the form is provided below:

https://www.educause.edu/-/media/files/educause/hecvat/hecvat403.xlsx