



# UNIVERSITY OF KENTUCKY

## Purchasing Division

### Written Questions and Answers

Gift Processing & Record Management Solution

UK-2337-23

Closing Date: April 27, 2023

Today's Date: April 13, 2023

No.	Question	Answer
1	Do you know if UK Advancement is open to replacing more than just Gift Processing & Record Management within their current advancement solution?	The scope of this RFP is Gift Processing and Record Management. It may be considered based on how the functionality of this solution meets the business needs outlined in Appendix A.
2	Can you please provide a high-level overview of your Advancement Office structure and how Central IT and Advancement work together?	Central IT manages the SF org administration and integrations. Advancement maintains business process and data. Advancement Office structure - <a href="https://www.kentuckycan.uky.edu/human-resources-and-talent-management/about">https://www.kentuckycan.uky.edu/human-resources-and-talent-management/about</a>
3	Will this project be led by Advancement, Central IT, both, other? If multiple, which office will be responsible for what role?	Advancement with support from Central IT – Advancement is responsible for the business process and defining business needs, Central IT will assist with system implementation and overall integration
4	What are the minimum functions that need to be in place for go-live (e.g., full legacy system replacement, portal replacement, etc.)?	All requirements listed in Appendix A as essential/non-negotiable to the project/initiative.
5	Are there any institutional initiatives (e.g. Capital Campaign, Student System Replacement, etc.) that could affect resource availability?	Resource availability restrictions have been defined in section 7.1 of the proposal.
6	Our solution consists of multiple modules that are tightly connected in order for delivered functionality to work properly, and requires implementing all modules, including Bio/Demo (records management), Prospect Management and Gift Processing. Would the University of Kentucky consider this approach?	It would be considered based on how functionality of Gift Processing & Record Management Solution met the business needs outlined in the requirements in Appendix A
7	Does the University of Kentucky have the budget approved for a \$400,000+ implementation project?	Appropriate financial resources have been identified for the implementation of this project. Implementation costs will be a factor in vendor selection should multiple products meet the business requirements as defined in the RFP.

8	Is it possible to provide a breakdown of user counts by role (e.g. Advancement Services/Operations, Gift Officers, etc.)?	<b>OVERALL 200 USERS</b> Including: Gift Receiving - 10 Alumni Association – 21 Annual Giving – 5 Gift Officers – 67 Foundation/Corp - 2 Prospect Mgmt/Research - 5 Records Team - 4
9	Does your institution have a focused stewardship, donor relations or giving society program?	Yes, at this time we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
10	Does your institution track paid alumni dues/memberships?	Yes, at this time we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
11	Along with migrating your institution’s legacy data: <ol style="list-style-type: none"> <li>1. Are there any additional shadow databases that need to be migrated?</li> <li>2. How many total New Constituent records will need to be migrated?</li> <li>3. How many total Income/Gift records will need to be migrated?</li> <li>4. How many new Constituent (Entity) and Gift records are estimated to be added on a yearly basis?</li> <li>5. Are you aware of any data issues in your current legacy system (e.g., historical data issues from a prior conversion that were never cleaned up, etc.)?</li> </ol>	<ol style="list-style-type: none"> <li>1. There are shadow lists and Excel files where departments are sitting on unshared information.</li> <li>2. 800K+ contacts are in the current SF org.</li> <li>3. Approximately 3.2M gift rows.</li> <li>4. 25K+ New constituent records and 90K+ gift records</li> <li>5. There are data issues with some gift records prior to our 1999 (Our last database conversion).</li> </ol>
12	What other systems will need to integrate with this new solution? <ol style="list-style-type: none"> <li>1. If possible, please describe the method of integration (e.g. flat file, API, etc.) and frequency (Nightly, Monthly, on-demand, etc.) preferred for the different system integrations.</li> <li>2. If you have a diagram that shows your current integrations and their flow/relationship to your current advancement system that would be helpful.</li> </ol>	SAP HR (payroll deductions - 3x /mo.) SAP FI (payroll deductions/gift processing - daily) SAP HANA (various data pulls, gift records will be pushed into HANA)
13	Is there an Integration/Middleware solution in place for existing integrations?	We are currently using various integrations via SSIS, Talend and Heroku.

14	Are you using payment processors today for financial transactions? If yes, which products and for what type of information?	<ul style="list-style-type: none"> <li>• BlueFin/PayConex for manual processing of credit card transactions.</li> <li>• Authorize.net API with Network for Good online giving page for credit card transactions</li> </ul>
15	Do you currently have resources who knows Salesforce? If so, do they have any Salesforce certification and what capacity will they be involved in the project?	We have a lead CRM administrator, junior CRM administrator, trainer and integration specialist.
16	Do you anticipate having resources trained in Salesforce before or during the project to perform data loading and Salesforce administration?	Yes, and we will continue to train in Salesforce throughout this project.
17	How many events does the institution host annually?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
18	What is the total number of Annual Registrations?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
19	What is the total number of Registrations Free/Paid/Both?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
20	What is the total number of event creators?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
21	What is the total number of users who need visibility access (not event creators)?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
22	Are there any event data that needs to be migrated? If so, what volume?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.

23	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.	Online Giving, Profile Updating/Viewing, and Giving History Portal – the Alumni Association is currently utilizing another vendor for Events, Volunteer Management, Chapters/Clubs, Mentoring, News, Directory, Job Postings and Referrals with some profile updating/viewing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
24	How many total Alumni records will need to be migrated to the new solution?	Approximately 800,000 constituents and 50,000 entities (businesses, foundations, organizations, etc.)
25	How many Alumni could make use of a new, richer Alumni Community (portal)?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
26	What is the usage (logins per month, users) of the existing Alumni portal?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
27	Are all Grateful Patient records imported into the CRM as constituent records? Or is there a screening process applied to individuals before importing?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
28	Approximately how many grateful patient records will be a part of the conversion process? How many new grateful patient records are anticipated on an annual basis?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
29	How many emails does the department send to constituents per year?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
30	How many contacts (unique email addresses/handles) are there in your marketing database?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.

31	How many users are there in the current marketing automation system(s)?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
32	How many departments will be utilizing the solution?	Primary utilization by the Gift Receiving team, viewing, and reporting utilization will depend on implementation and integration with current CRM.
33	Do your departments require separate data security, content, and reporting? Or can they work in a shared environment?	Yes, only the Gift Receiving team should be creating and editing within Gift Processing. Others would need read access.
34	If applicable, please list an approximate number of users by business unit (i.e. Annual Giving – 3, Alumni Association – 6, Donor Communications – 4, etc.)	Gift Receiving (10), Information Services (10), UKPAE Leadership (10)
35	What reporting do you rely on from your current email marketing solution?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
36	What are the key metrics / reports you expect to be able to monitor?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
37	What are your key objectives for digital marketing/marketing automation?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
38	What is your current email system(s) being used for today (mass emails, drip campaigns, fundraising, other)?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
39	Are you planning to retire all other email solutions as part of this transition?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
40	Do you have documented personas (prospect profiles / audiences) for your digital campaign work?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.

41	Describe a typical email campaign. Is it automated? If available, please share a diagram or workflow.	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
42	Do you anticipate needing strategy/tactical consultation and support for your email campaign development moving forward?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
43	Will you require multiple IP addresses or domain names? If so, please describe.	If question is related to email campaigns: At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
44	Can you describe how you manage email subscriptions today (email opt in's/out's)?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
45	How does the department currently make use of social media platforms (Facebook, Instagram, Twitter, Weibo, WeChat etc.)? What are the volumes of posts, mentions etc.? How is social listening utilized?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.
46	How many text messages and push notifications does the department send to constituents per year?	At this time, we have another vendor that we are currently utilizing. Although this RFP is focusing on Gift Processing & Record Management it does not mean that we will not look at other modules in the future.