



**Questions and Responses # 1**  
**Alumni Customer Relationship Management (CRM)**  
**Project No. Request for Information (RFI) TU-2317**

November 9, 2022

**Procurement**  
8000 York Road  
Towson, MD 21252-0001

Ladies and Gentlemen:

Below are questions and responses to aforementioned solicitation. Any response resulting in a revision to the solicitation will be included in an Addendum.

**Questions:**

**Q1.** Please provide the approximate number of users that will use the Advancement CRM solution

**A1. Approximately 50 users.**

**Q2.** What is your total constituent count? (A constituent is defined as the total number of person and organization records in your advancement database regardless of status or type of record.)

**A2. 250,000-300,000**

**Q3.** In the use of Ellucian Advance Web today, what subsystems do you utilize? (Biographic, Gift, Prospect, Events, Membership)

**A3. Biographic, Gift, Prospect and Stewardship**

**Q4.** What email marketing communication platforms do you use (iModules, SF Marketing Cloud, Mailchimp, MyEmma, other)?

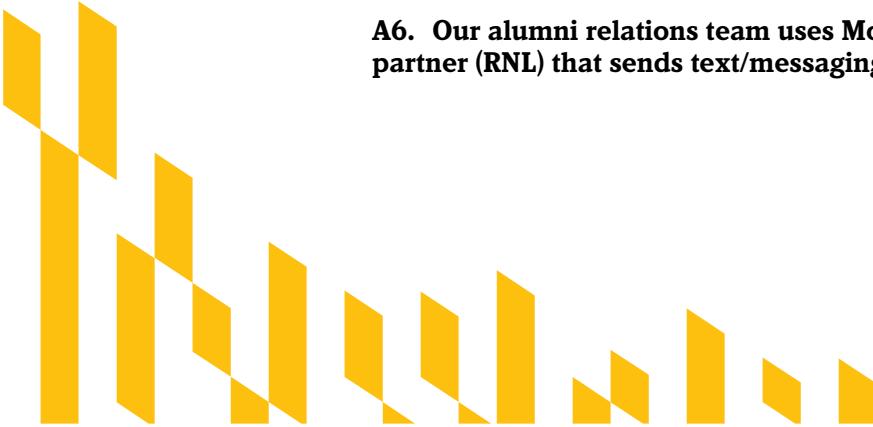
**A4. TargetX, Salesforce Marketing Cloud, and ThankView**

**Q5.** What is your estimated bulk email marketing annual message send volume?

**A5. 1.5 million**

**Q6.** What text/messaging communication platforms do you use (Twilio, Signal Vine, Mongoose, other)

**A6. Our alumni relations team uses Mongoose. Additionally, we have a phonathon partner (RNL) that sends text/messaging communications on our behalf.**



**Q7.** What is your estimated annual SMS text/message send volume?

**A7. Less than 10,000**

**Q8.** What tool, if any, do you use for address verification (Strike Iron, Experian QAS, other?)

**A8. Initium**

**Q9.** What wealth screening service/system do you use (WealthEngine, ResearchPoint, HEP Data, other)?

**A9. DonorSearch**

**Q10.** What system do you use for managing events (CVENT, Eventbrite, iModules, other)?

**A10. Linvio**

**Q11.** What Alumni Portal platform do you use? (iModules, other)

**A11. SF Lightning Community**

**Q12.** What office productivity platform(s) do you use for email, tasks, calendar, documents, etc. (MS Office, Google Suite, other)?

**A12. Microsoft 365**

**Q13.** What reporting tool(s) are currently in use at your institution? (Crystal, Argos, SSRS, Cognos, other)

**A13. ABI, Power BI Dashboard, Salesforce, SQL**

**Q14.** Considering your IT/Advancement Services resources, are you interested in assistance with developing any reports and/or dashboards that may be necessary for your go-live, and how many reports would fall into this category for assistance?

**A14. Yes. Approximately 50.**

**Q15.** How are you handling third party and internal systems imports/integrations (flat file imports, SFTP, APIs, etc.)? Please provide a listing of current integrations along with the method used for integrating each.

**A15. Blackbaud Financial Edge NXT (combination of SFTP and flat files); PeopleSoft (flat file); Salesforce (flat file and API coming from our copy of the Advance**



**database/Oracle tables); Blackbaud Award Management & Blackbaud Stewardship Management (flat file); ThankView (flat file); Gravyty (flat file); RNL Engage (flat file).**

**Q16.** Do you have any API based integrations that you intend to bring forward and use with the CRM solution?

**A16. Yes**

**Q17.** Considering your IT/Advancement Services resources, are you interested in a workshop to learn how to leverage delivered APIs to develop integrations (to create your own integrations)?

**A17. Yes**

**Q18.** Considering your IT/Advancement Services resources, are you interested in assistance to develop custom API based integrations, and how many integrations would fall into this category for assistance?

**A18. Yes. We would be interested in learning more about the type of assistance offered and the associated cost. We are uncertain, at this time, how many integrations fall into this category.**

**Q19.** Do you have any data sources outside of your Ellucian Advance Web database that would need to be converted to the CRM solution, and need to be included in the Provider's implementation services? What is included in that listing of data sources?

**A19. None that need to be converted during implementation.**

**Q20.** Have you customized your Ellucian Advance Web system (Custom tables, usage of tables differing from original definitions, field additions/modifications, etc.), and how many customizations would need to be brought forward into the CRM solution?

**A20. Yes. Many customizations have been made by University of Maryland Foundation staff, and Towson University staff are not aware of all of those that have been made and how many would need to be brought over. We would need a discovery process to analyze the current structures against the origin standards and an evaluation of each change's destination or intention.**

**Q21.** If a contractor is contacted to conduct a demonstration, is Towson agreeable to schedule a prep call with our demo consultant to discuss your current business processes to better align demo topics?

**A21. Yes**

**Q22.** The RFI asks to include fee schedules for the system "that are available via your firm's website (public information)." If our proposed fee schedules are not public, do you still wish for them to be included in the proposal?

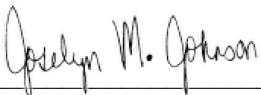
**A22. Yes**

**Q23.** RFI states "All addenda will be incorporated into the final contract documents and will be binding on all bidders/offerors responding to this solicitation. Each bidder/offeror submitting a bid/proposal must acknowledge receipt of all addenda by completing and forwarding Exhibit K (included in bid package) with the response. Failure to acknowledge addenda may result in the bid/proposal rejection." Exhibit K was not included.

**A23. See Addendum #3.**

**Q24.** What email subject should we put on the email we use to submit the bid? Is it okay if the email subject reads - **RFI for the Customer Relationship Manager (CRM) for Towson University Alumni engagement efforts.**

**A24. Please use "RFI for the Customer Relationship Manager (CRM) for Towson University Advancement efforts." Please also include your company name.**

Issued by:   
Name, Procurement Officer

