ADDENDUM #1

DATE: December 15, 2021

TO: Prospective Proposers

RE: Addendum #1
Selection of a Vendor to Provide a New Donor and Alumni Database System
Tyler Junior College
RFP No: J2120-22-05

NOTICE TO PROPOSERS:

This Addendum forms a part of the Notice to Bidders. **Acknowledge receipt of this Addendum in the Proposal/Quote.** Failure to do so may subject Proposer to disqualification.

QUESTION #1: What version of the HECVAT assessment do you ask vendors to complete, Full, Lite, Triage, On-Prem?

ANSWER: Our preference would be the Full as this scope of work includes highly-sensitive information related to TJC that must remain secure. Also have in place the TX-Ramp provisional status certification at the time of the contract.

QUESTION #2: What other technology is currently used at TJC for alumni/development effort, E.g. SIS, Enrollment, Finance, Athletics, Alumni, Online Engagement/Donations, Scholarship/Award, Donor Analytics, etc.?

ANSWER: Encompass by Anthology, AcademicWorks by Blackbaud, Ellucian Banner (HR, Finance, Student).

QUESTION #3: What integration, if possible, is necessary with the future Alumni/Development system?

ANSWER: The new CRM will need to be able to receive constituent data from the student database of record as those students graduate and become alumni. It will also need to be able to receive constituent information from HR as new employees are hired. The new CRM will need to be able to push gift information to Finance and Accounting. All three of those areas currently use Ellucian Banner.
QUESTION #4: Please confirm the version of Ellucian software that will be converted from. How long has this system been in place? How many years of giving history?

ANSWER: Ellucian Banner Advancement 9.3.10.03. 5 years. More than 40 years of giving history.

QUESTION #5: Please provide the number of users by job function, number of major gift officers, number of gift processing staff, number executive level, number IT/technical, etc. Or alternatively do you have an organizational chart and list of employees by title who will be accessing the system?

ANSWER:
VP for Institutional Advancement
Director of Advancement Operations
Director of Grants Development
Director of Major Gifts and Special Initiatives
Director of Alumni Relations
Director of Annual Giving
Alumni Relations Coordinator (memberships processor)
Manager of Donor Relations and Special Events
Coordinator of Donor Relations (gift processor)
Coordinator Advancement Operations
Coordinator Special Events (registrations processor)
Executive Administrative Assistant
Student worker
There may be new team members in the future.

QUESTION #6: Any third-party vendor access, mail houses, agency, caging/fulfillment?

ANSWER: Not currently. It would be nice to have an API for third-party integration access and process automation.

QUESTION #7: Describe the integrations that are required. Are they true integrations or file feeds? Will you need any campus partners or collaborators to participate, i.e. staff from HR, finance, or central IT?

ANSWER: The new CRM will need to be able to receive constituent data from the student database of record as those students graduate and become alumni. It will also need to be able to receive constituent information from HR as new employees are hired. The new CRM will need to be able to push gift information to Finance and Accounting. All three of those areas currently use
Ellucian Banner. These are either previously custom-built integrations or file feeds. Yes, those mentioned in question, plus the Registrar and IT. APIs or file feeds.

QUESTION #8: Do you plan on having non-staff users, e.g. volunteer access?

ANSWER: Student worker. Volunteer fundraiser access/tools would be beneficial; not required today.

QUESTION #9: Describe your current reporting environment.

ANSWER: IBM Cognos and flat file data exports, along with fancy MS Excel tricks.

QUESTION #10: Are users expected to run reports and to what level of reporting do they perform? Break out by user groups, support teams to executive staff. How many staff write reports?

ANSWER: Users are expected to be able to run existing reports. One staff person (on IT team) writes most of the reports. The complexity of the reporting varies. It ranges from simple mailing lists to multi-variable giving reports.

QUESTION #11: Describe your training program. Do you have dedicated staff developing and providing training? What kind of training, just-in-time, helpdesk, formal classroom training?

ANSWER: Training on the existing system is an ongoing part of the job. Vendor will be expected to provide initial training as part of the contract and on-going learning/training materials for features (current and new) throughout life of the partnership. No dedicated staff developing/providing training. Beyond the initial onboarding, it is just in time and provided by the employee’s supervisor.

QUESTION #12: In addition to the current existing database, are there any ancillary databases or data sources that need to be considered for conversion?

ANSWER: Yes. Unfortunately, we have several approved shadow databases (aka alumni association data appends, event RSVP lists, etc.) that will need to be merged into the final CRM as the parent solution. Additionally, the Anthology Encompass solution may have additional valuable data to consider migrating into the new CRM.

QUESTION #13: Is budget approved and in place for the purchase and implementation of a new system in the current fiscal year?

ANSWER: N/A.
QUESTION #14: How many vendors have been invited to participate in the search? Please list by company name and product being considered. Is the college currently using any such similar product or has it checked any product in the market that could meet the scope?

ANSWER: Due to the formal RFP process, this cannot be disclosed, although the RFP is open to all vendors and posted on the TJC website.

QUESTION #15: Prior to the issuance of the RFP, were any systems already reviewed by the Advancement staff? Is the college currently using any such similar product or has it checked any product in the market that could meet the scope?

ANSWER: There were systems reviewed as a result of a prior RFP issued in the summer of 2019, which was cancelled before award.

QUESTION #16: Please enter the name and email of the Primary Contact for the RFP and Organization name.

ANSWER: This information is provided in the RFP documents.

QUESTION #17: What is the primary legacy CRM/system for the organization?

ANSWER: Ellucian Banner Advancement.

QUESTION #18: Is the CRM installed locally or hosted?

ANSWER: Hosted. We are not hosted for Banner in any module. We are On-prem.

QUESTION #19: What is the total constituent/contact record count in the CRM?

ANSWER: Approximately 150,000.

QUESTION #20: What is the total gift/donation count in the CRM?

ANSWER: Approximately 53,000.

QUESTION #21: If the organization uses campaigns, funds or projects, appeals or packages, please enter the total number of records (active and inactive) for each.
ANSWER:
Campaigns: Approximately 200
Funds (Projects): Approximately 1,000
Appeals: Approximately 550
Packages: 0

QUESTION #22: If the organization uses any of the areas below, please provide the total count for each record type below: Actions or communications; notes; events; participants; memberships; volunteer jobs/assignments; proposals; grants; tributes.

ANSWER: N/A. We have only recently started with several of these within Banner. There is more of this information tracked outside the CRM today than inside it. We would love to get it moved over. Historical actions have been stored via contact within the current system. Membership is the alumni association with multiple levels.

QUESTION #23: Will all constituent/contact records migrate to the final solution? Or is there an evaluation process for streamlining unused/old records?

ANSWER: All records. We would be open to this, but don’t have an existing process and would require guidance.

QUESTION #24: Please describe any repurposed standard CRM fields (such as changed ethnicity to T-shirt size).

ANSWER: As far as we know, we do not have any repurposed fields.

QUESTION #25: Do you have an estimate of the current number of duplicate constituent/contact records?

ANSWER: No.

QUESTION #26: What types of gifts does the organization track, cash, pledge, recurring gift, stock/property, gift-in-kind, other?

ANSWER: This is everything listed as a gift type. It may be that the current database does not contain any gifts of that type. American Express, bequest of property, cash, check (business), cash/check, check (personal), deferred (not bequests), Discover, EFT bank transfer, gift-in-kind of good only, personal property only, gift-in-kind of goods, gift-in-kind of property, gift-in-kind of services, Banner HR payroll deduction, MasterCard, matching gift, oil and gas royalty, online transaction, personal property, property or land, sticks or securities, Visa, recurring gift.
QUESTION #27: Does the organization track any non-tax deductible or partially tax-deductible gifts/donations?

ANSWER: Yes.

QUESTION #28: Please note any custom gift fields or gift-specific tracking requirements.

ANSWER: As far as I know, there is not anything that isn’t specific to the system. We will want the ability to track gifts by various appeals. Of course, we will want to track gifts by campaigns, fund and appeals.

QUESTION #29: What financial system does the organization use?

ANSWER: Ellucian Banner Finance (AR/AP).

QUESTION #30: Is the CRM directly integrated with the financial system?

ANSWER: Any CRM under consideration must be able to feed gift information to the financial system.

QUESTION #31: What is the total number of pledges?

ANSWER: There are approximately 600 active pledges.

QUESTION #32: What is the total number of active pledges?

ANSWER: Approximately 600.

QUESTION #33: What is the total number of recurring gifts?

ANSWER: We have less than 25 credit-card-based recurring gifts and 200 plus payroll deduction recurring donors that are active.

QUESTION #34: What is the total number of active recurring gifts?

ANSWER: See above.

QUESTION #35: When outlining migration plans, does the organization envision having recurring gifts set up with your current payment processor or prefer to move to an alternate processor?
ANSWER: Preference is to use current processor (stripe), but open to evaluating changes as needed.

QUESTION #36: Do you anticipate making any major changes to your campaign, fund, and appeal structure?

ANSWER: No.

QUESTION #37: Any large fundraising initiatives that the organization will embark on in the near future?

ANSWER: Comprehensive campaign in the next couple of years.

QUESTION #38: Please select each of the types of relationships that the organization currently tracks and will require to migrate: individual/contact; non-constituent/contact; organizations/company; education; solicitor/fundraiser; financial; other/please specify.

ANSWER: Individual/contact; non-constituent/contact; organizations/company; education; solicitor/fundraiser; financial; parents/students.

QUESTION #39: Do you track staff fundraisers/missionaries?

ANSWER: Yes, we track the solicitor of a gift.

QUESTION #40: Will all users have access to all data in the new system? If not, will users be limited to seeing only specific groups of records or types?

ANSWER: Yes.

QUESTION #41: What supporting products are utilized in addition to the CRM?

ANSWER: Encompass by Anthology, AcademicWorks by Blackbaud, Ellucian Banner (finance, HR and student).

QUESTION #42: Are any of these supporting products directly integrated and need the integration replicated in the final solution?

ANSWER: These are custom integrations for these today which will need to keep working with the new CRM. Encompass should be able to pass data back and forth between itself and the CRM.
QUESTION #43: Any additional legacy data other than the CRM that may need to be consolidated with the CRM?

ANSWER: Yes. Unfortunately, we have several approved shadow databases (aka alumni association data appends, event RSVP lists, etc.) that will need to be merged into the final CRM as the parent solution. Additionally, the Anthology Encompass solution may have additional valuable data to consider migrating into the new CRM.

QUESTION #44: How many alumni and donor contacts do you communicate with annually?

ANSWER: Approximately less than 50,000 today. Planning to be approximately 100,000 by the end of 2022.

QUESTION #45: If there a budget assigned for this RFP? If yes, how much is it?

ANSWER: This information will not be provided. Not applicable.

QUESTION #46: Our client presence is primarily outside the US. Will that be a deterrent to our participation in any way?

ANSWER: Yes, legally it’s hard for us to contract with an international company who does not have a US office or presence, especially if we can get those services/items in the US.

QUESTION #47: Are solicitors/fundraisers associated with gifts? If so, are multiple solicitors tracked on gifts?

ANSWER: Yes. Multiple solicitors are not currently tracked on a gift. It would be a very welcomed feature in the new system.

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