

Advancement Donor Management Solution

Request for Proposal #222-20

December 3, 2021

[Section 1 – Introduction 3](#_Toc89429147)

[Section 2 – Deadline, Schedule, and Contacts 4](#_Toc89429148)

[1. Proposal Deadline 4](#_Toc89429149)

[2. Schedule\* 4](#_Toc89429150)

[3. Contact and Questions 4](#_Toc89429151)

[4. Review Teams 5](#_Toc89429152)

[Section 3 – Background and Advancement Data Summary 5](#_Toc89429153)

[1. Background 5](#_Toc89429154)

[2. Advancement Data Summary 5](#_Toc89429155)

[Section 4 – Proposal Format and Responses 7](#_Toc89429156)

[1. Executive Summary 8](#_Toc89429157)

[2. Vendor Experience 8](#_Toc89429158)

[3. System Requirements 8](#_Toc89429161)

[4. User Experience 9](#_Toc89429162)

[5. Implementation Services Scope 10](#_Toc89429163)

[6. Approach / Methodology, Deliverables and Schedule 11](#_Toc89429164)

[7. Staffing and Fee Structure 11](#_Toc89429165)

[8. Additional Product or Service Information 12](#_Toc89429166)

[9. Vendor Signature Authority 12](#_Toc89429167)

[Section 5 – Demonstrations and Interviews 12](#_Toc89429168)

[1. General Demonstration 12](#_Toc89429169)

[2. Technical Review Interview 12](#_Toc89429170)

[3. Subject Matter Expert Demonstration 13](#_Toc89429171)

[4. Advisory Committee Demonstration 13](#_Toc89429172)

[Section 6 - Conclusion and Wrap-up 13](#_Toc89429173)

[Appendix 1 – Detailed Questions 15](#_Toc89429174)

[1. Systems Architecture 15](#_Toc89429175)

[2. Data Security & Data Access 15](#_Toc89429176)

[3. Authentication, Permissions, and Identity Management 16](#_Toc89429177)

[4. Integration & Extensibility 16](#_Toc89429178)

[5. Vendor Support 17](#_Toc89429179)

[6. Migration 18](#_Toc89429180)

[7. Staff Functions 18](#_Toc89429181)

[8. Training 20](#_Toc89429187)

[Appendix 2 - Terms and Conditions (Rev. 5.15.18) 21](#_Toc89429188)

# Section 1 – Introduction

Grand Valley State University (**GVSU**) is requesting proposals for an Advancement Donor Management Solution for higher education, supporting the needs of the University Development Division and its related functions. The proposal should include a software solution and a migration pathway from the current existing donor management system to the new system. The request for proposal will be referred to as (**RFP**) and includes the following sections:

**Section 1 – Introduction**

This section identifies each section in the RFP, and basic description. Each section should be reviewed and addressed as appropriate. There are six sections making up the RFP.

**Section 2 – Deadline, Schedule, and Contacts**

The proposal deadline, complete proposal schedule, contact, and GVSU team descriptions are included in this section. Proposals must be received by the deadline identified in this section to be considered. Questions should be submitted to the contact identified in this section. Vendors must also identify a single contact.

**Section 3 – Background and Advancement Summary**

General overview of GVSU with additional information regarding the current Development Division Donor Advancement Solution and data summary. Located in West Michigan, GVSU has been recognized as a top public regional university by ‘US News’ and ‘World Report’. The Development Division is responsible for receipting gifts made to GVSU and the GVU Foundation. The division’s current donor management solution has been in production for the past 18 years.

**Section 4 – Proposal Format and Responses**

This section must be completed by vendors. Answers to the questions must follow the numbering of each subsection. In order to advance to the next phase of *Interviews and Demonstrations* as discussed in section 5, top vendors will be selected based on their completed answers in this section.

**Section 5 – Interviews and Demonstrations**

The finalists will be requested to attend and respond to interviews and demonstrations as outlined in this section. Sample interview questions have been compiled by key departments within GVSU. Vendors should be prepared to answer questions in Appendix 1.

**Section 6 – Conclusion and Wrap-up**

Final comments regarding submission of the RFP.

**Appendix 1 – Sample Interview and Demonstration Questions**

Comprehensive listing of questions identified by the review teams.

**Appendix 2 – Terms and Conditions**

GVSU standard terms and conditions for contracts.

# Section 2 – Deadline, Schedule, and Contacts

## Proposal Deadline

GVSU must receive proposals no later than **5:00 p.m. ET** on **January 17, 2022**. Proposals received after the time and date specified above will not be considered.

Electronic copies of proposals are required, and shall be submitted via email to Kip Smalligan at [smalligk@gvsu.edu](mailto:smalligk@gvsu.edu) with the subject line “**Advancement Donor Management Solution Proposal Response 222-20**”.

## Schedule\*

|  |  |
| --- | --- |
| Events | Deadlines |
| Release RFP to Vendors | December 6, 2021 |
| Vendor RFP Questions to GVSU | December 17, 2021 5:00 p.m. ET |
| GVSU Answers Provided to Vendors | December 23, 2021 5:00 p.m. ET |
| **RFP Submissions Due to GVSU** | **January 17, 2022 5:00 p.m. ET** |
| GVSU Review of RFP Submissions | January 17-28, 2022 |
| Vendor Interviews and Demonstrations | February 7-25, 2022 |
| **Proposal Awarded** | **March 30, 2022** |

\*Note: GVSU is closed for winter break December 23, 2021 through January 3, 2022.

Should it become necessary to revise any part of the RFP, notice of the revision will be given in the form of an addendum on record, to all prospective suppliers as having received the RFP. Any addendum notices will also be posted on the [Bid Opportunities page](https://www.gvsu.edu/purchasing/bid-opportunities.htm) of the GVSU Procurement Services website [www.gvsu.edu/purchasing](http://www.gvsu.edu/purchasing). Each supplier should acknowledge receipt of any addendum in their proposal on the proposal form (pages 27-28), but failure of a supplier to receive or acknowledge receipt of any addendum, shall not relieve the supplier of the responsibility for complying with the terms thereof.

## Contact and Questions

Direct all questions regarding this RFP to Kip Smalligan at 616-331-3211 or [smalligk@gvsu.edu](mailto:smalligk@gvsu.edu). Vendor understands and agrees that any and all questions with regards to this RFP, whether content or process, will be directed to Kip Smalligan. Should vendor contact anyone else within GVSU regarding this RFP other than the contact defined above without GVSU’s prior approval, GVSU reserves the right to remove the vendor from further consideration. All inquiries regarding the RFP must be submitted in writing (via e-mail), and responses to such inquiries will be made in writing and communicated on the [GVSU Bid Opportunities web page](https://www.gvsu.edu/purchasing/bid-opportunities.htm). Vendor agrees to designate one point of contact for all RFP and/or proposal communications.

Questions must be submitted no later than **December 17, 2021 by 5:00 p.m. ET**.

It is GVSU’s preference to award this RFP to a single supplier. GVSU reserves the right to accept or reject any or all proposals. Refer to *GVSU General Terms and Conditions* listed in Appendix 2.

GVSU is Michigan sales, and use tax exempt. Exemption certificate will be provided to the awarded supplier. Acceptance of awarded proposal will be made by purchase order.

## Review Teams

Three teams have been identified to review and recommend the top solutions to replace the current Advancement Donor Management Solution based on the responses by vendors in this RFP. These teams include:

1. Advisory Team

Consists of representation from multiple departments within GVSU, to provide insight on a larger scale while assisting the Development Division in navigating the RFP process.

1. Conversion Data Integrity Group

This group will serve as data governance during the conversion. Additionally, they will be responsible for documentation and refinement of processes, roles, policies, and standards for the existing Millennium system.

1. Subject Matter Experts

These individuals will have existing processes they use within the Millennium system. Group members will be identified to attend demos, testing, and provide recommendations.

# Section 3 – Background and Advancement Data Summary

## Background

Grand Valley State University, established in 1960, is a public university chartered by the State of Michigan legislature in response to the need for a public, four-year college in the state’s second largest metropolitan region. It attracts more than 25,000 students with its high-quality programs and state-of-the-art facilities. GVSU provides a fully accredited undergraduate and graduate liberal education, and has campuses in Allendale, Grand Rapids, Holland, with centers in Muskegon and Traverse City.

GVSU is a comprehensive regional university offering 86 undergraduate, and 36 graduate degree programs. The university is dedicated to individual student achievement, and going beyond the traditional classroom experience with research opportunities and business partnerships. This combination of educational offerings helps GVSU to fulfill its mission of educating students to shape their lives, their professions, and their societies.

As a model for sustainable development, GVSU fosters responsible economic growth. First-rate faculty and staff, who are attracted to the university’s rich academic culture, share their expertise, time, and knowledge with students. The university’s outstanding students learn critical thinking skills and are transformed into enterprising individuals who are well prepared to take leadership roles in their professions and in their communities. The university community comes together to make Grand Valley a significant force on the area’s economy.

GVSU represents top performance and top value. The university has been recognized for the past 25 years as one of “America’s 100 Best College Buys” because of the high-quality education opportunities it provides at an affordable tuition rate. GVSU has been named by ‘The Princeton Review’, ‘U.S. News’ and ‘World Report’ as a best regional university in the Midwest.

## Advancement Data Summary

GVSU is requesting proposals from vendors to provide a customizable and comprehensive Advancement Donor Management Solution. The goal is to increase fundraising, improve PBS/NPR business functions, strengthen alumni relations, and improve collaboration throughout the university. The ideal solution would also provide advanced reporting in an easy environment, to allow multiple types of users access to the data needed in a quick and efficient process. GVSU is not looking to replicate existing functionality, but would like to find a software solution that combines functionality of a traditional donor management system with improving outcomes and efficiencies.

Migration of the current data is also a consideration when converting to a new solution. The current donor solution has been used extensively for the past 18 years. As such, there is a great deal of data to be moved and transferred over to the new system. The Development Division and WGVU (FM/TV) have used the system for gift management, along with functions of the traditional legacy donor management system.

The Development Division currently manages the existing, on premises, donor and membership management software system, Millennium by Community Brands. The new Advancement Donor Management Solution should provide for a hosted or cloud alternative.

The following chart provides a statistics summary of the existing Advancement Donor Management Solution as of 10/22/2021.

|  |  |
| --- | --- |
| Statistic | Quantity |
| Constituents | 472K |
| Gift Transactions | 1.2M (47K average annual) |
| Dues Transactions | 1.8M (107K average annual) |
| Named User Licenses | 105 |
| Department Usage | 7 |
| Correspondence Transactions | 25M |
| Fund Raising 5-year average | $25.5M |
| Donor Count 5-year average | 38.3K |
| Alumni | 130K |
| Events | 100+ annual events |

Capabilities and features used extensively in the current Advancement Donor Management Solution are listed in the following chart:

|  |  |
| --- | --- |
| Functional Area | Detail |
| Biographical | Address  Name  Attribute  Correspondence  Relationship  Educational Background  Job/Employment  Deceased  External Document Linking  Constituent Photo |
| Event Management | RSVP Tracking  Event Naming  Event and Activity Tracking  Registration |
| Stewardship | Named Spaces and Donor Wall Recognition  Volunteer Management  Scholarship and Endowment |
| Gift and Dues Transactions | CASE Reporting Standard Guidelines  Chart of Accounts  Gifts/Pledges/Gift-in-Kind/Quid/Credits/Bequest/Expectancies  Membership  Receipting |
| Prospect Management | Portfolio Management  Action/Tasks  Demographic – Prospect Rating and Scores  Financial – Donor Societies  Proposals  Tracking  Planned Gifts  Media |
| Data Import/Export | Accessible Back-end Database  MS SQL Server Management Studio (SSMS)  MS SQL Server Integration Services (SSIS)  Integration with CMS/Oracle – Institutional Marketing  API Integration (RESTful API)  Direct Import/Export Utility  Stored Procedure and Job Management  Advanced Data Examiner (ADE) – User-based utility to import data.  PAYA Payment Solutions  Emma – API  Other 3rd Party Integrations |
| Reporting | Custom Criteria Selection  Scheduled Output  Custom Formatting Options (Crystal Reports/Power BI)  Paginated Reports  Export Data (csv, txt, xlsx) |

# Section 4 – Proposal Format and Responses

This section outlines the requirements for your response. Include all information and materials requested in this section. All pages of any proposal submitted must be in the format embedded in this section and responses must follow the numbering of the subsections. Alternatives may be presented in detail provided they offer an innovative solution.

Vendors may include any additional information and material they wish; however, such material (e.g. alternative services and/or features) shall be identified in a separate attachment. Any such attachment shall identify the applicable RFP section and subsection to which it is responsive and shall be incorporated into and be made a part of the proposal.

Please identify in your response, any criteria required by this proposal that you believe you would be unable to meet.

## Executive Summary

The executive summary will highlight the key messages of your proposal and benefits of selecting your company.

## Vendor Experience

Complete all questions in this section.

* 1. Provide a summary of your company’s experience and qualifications, including a brief company history, ownership information, number of employees, percentage of employees assigned to product development and/or support, headquarters address, and names of key executives.
  2. Discuss the company’s corporate outlook over the next three years, including market share, stability, goals, and major initiatives.
  3. What standard services does the company provide as part of implementation?
  4. How many conversions from Millennium have you performed with institutions of Higher Education? At least one of these projects should be included as a reference.

1. When were the conversions performed?
2. What was the organization size of those implementations?
3. What was the timeline of those implementations?
   1. Please describe projects your company has performed, that are similar in scope/size to the project described in this RFP.
4. When were those performed?
5. What was the organization size of those implementations?
6. What was the timeline of those implementations?
   1. Provide three customer references that have implemented your system within the last three years, and are of a similar size to GVSU. Include customer name, contact name, phone number, and email address for each reference.

## System Requirements

The system requirements section should include answers to the following descriptions and questions. The section should include a clear description of the hosting environment and security, for a highly technical audience. Additional questions from GVSU technical staff will be asked during the interview stage. Questions are provided in Appendix 1 but are not required as part of the initial RFP submission. Answers should be provided to the questions listed below in this section and should be included in the RFP response.

* 1. Describe your hosting solution system architecture and security. Include system descriptions, location, accessibility, and digital accessibility.
  2. Describe the data center(s) where the hosting is performed, and any certifications or standards followed by the facility. Is data stored on redundant servers in multiple geographic locations?
  3. Can your solution use GVSU’s data stores (Active Directory, LDAP) for both staff and patron accounts? How does this capability work alongside identities natively managed within the proposed solution?
  4. Describe how the data are stored in the system. Include the database description and how the data will be accessed outside of the application.
  5. What uptime guarantees do you make in your standard service level agreement (SLA)?Include a copy of your Service Level Agreement.
  6. Does GVSU retain ownership of the data stored at the data center? Will our data be stored in a proprietary format? Are we able to, at any time, or on a regular schedule, acquire a snapshot of our full data? How about any metadata we generate while using your service/platform/application?

## User Experience

The user experience of the solution should be described for *Subject Matter Experts*. Examples of how your solution supports the functionality is recommended in this section. Additional questions from *Subject Matter Experts* will be asked during the demonstration stage. Questions are provided in Appendix 1 but are not required as part of the initial RFP submission. Answers should be provided to the questions listed below in this section and included in your RFP response.

* 1. Describe the functionality of your system as it relates to donor management. Include the following areas:
     1. Biographical
     2. Prospect Research
     3. Stewardship
  2. Describe how your system records donor gift and dues transactions, and financial tracking of constituent information. Include options for providing and tracking of receipts.
  3. Describe how membership tracking is managed.
  4. Does your solution support Public Broadcasting PBS/NPR integration?
  5. Describe how events are managed. Include events, associated activities, registration, and ticketing details.
  6. Describe the out of the box (OOTB) report building capabilities? What are the OOTB report data export options? Does the OOTB reporting charts offer drill-down capabilities?
  7. Describe any dashboards and display for customized metrics.
  8. Describe the options for complex data reporting exports for outreach using mail and email.
  9. Describe how your system manages Alumni constituent relations.
  10. Does your solution meet WCAG 2.1 AA guidelines for both public and staff interfaces? If not, what are your plans and timelines to meet those guidelines? If your solution does not meet WCAG 2.1 AA guidelines, does it meet WCAG 2.0 AA guidelines? If so, what is your timeline to update your interfaces to meet WCAG 2.1 AA guidelines?

## Implementation Services Scope

This implementation services scope section provides a high-level description of the implementation services to be included in the proposal. There are two alternative options. Option 1 identifies an implementation partner and Option 2 identifies services you would be able to provide as part of the RFP. A response to one of the options is required in this section, however, you may respond to both options.

OPTION 1 – Implementation Partner recommendation

* 1. Implementation Partner recommendations, include name and contact information of the preferred partner. Describe the relationship to this partner.

OPTION 2 – General project activities included in your proposal as provided by your organization. Each stage of the project should include:

* 1. Plan
     + - 1. Project Management
         2. Project Team Training
         3. Organizational Change Management
         4. Additional Planning and Preparation
  2. Architect

1. Analysis and Business Process Design
2. Solution Design

#### Configure

* + 1. Software Configuration
    2. Integration and Interfaces
    3. Data Conversion
    4. Reports, Queries, and Forms

#### Test

* + 1. Testing, Inclusive of Test Plan Creation

#### Deploy and Training

* + 1. Administrator Training and Knowledge Transfer
    2. Transition Support
    3. Documentation
    4. Implementation/Deployment (roll-out) Support
    5. Post-implementation Maintenance and Support

## Approach / Methodology, Deliverables and Schedule

The current donor management system has been used extensively and contains a comprehensive set of data. Every attempt should be made to make the best fit for the current data from the current system into the new system. The intent of the new system is to leverage the best set of information from the available data during the migration.

* 1. Present your proposed approach/methodology as you would tailor it specifically for this project. Please specify what deliverables would be produced and who would be responsible for producing the deliverable (GVSU vs. vendor). Include sample deliverables where applicable.
  2. Describe key differentiators (tools, techniques, methods) of your approach as it relates to implementing a solution on time, within budget and with the ability to meet the needs of GVSU.
  3. Include a proposed project schedule. On your proposed timeline, please include major milestones or checkpoints. Also include major dependencies that you believe have the possibility to impact the project.
  4. Describe your approach towards running parallel systems for a period of time.
  5. What additional add-on services do you offer that GVSU would benefit from during our implementation?

## Staffing and Fee Structure

Complete all questions and descriptions in this section.

* 1. How would you staff this engagement? Please mention your estimate of the number of people you would staff, their level of experience and their roles.
  2. Please provide your estimate of GVSU staff time and utilization, including descriptions of the roles and responsibilities and time commitment required for all phases of implementation.
  3. Propose the project structure for implementing the solution.
  4. Provide pricing for implementation in both a total lump sum, and an itemized version as applicable, including breakdown for each phase of implementation, for an engagement of this type, either on a T&M or Fixed-fee basis. Include an estimate for reimbursable travel & expenses.
  5. Describe and tabulate in detail the pricing model for the proposed solution and any add-on options; include the metrics used to drive the pricing model.
  6. Provide an estimated annual cost for the next five years. What factors have gone into the estimated annual cost?
  7. What are licensing options? Are there any minimum license thresholds?
  8. What capabilities within the solution are not included in the licensing quoted in this proposal? What are the cost models for each capability not included?
  9. Are there additional costs for a high performance/high scalability version?
  10. Are all tools included in the solution cost even if they are not used?
  11. How many add-on/separate solutions need to be integrated to meet the requirements of this RFP?

## Additional Product or Service Information

* 1. Proposers are welcome, but not required, to provide information about related products and services.

## Vendor Signature Authority

Proposals must be signed by an authorized officer of the vendor or other person authorized to bind vendor in this matter.

# Section 5 – Demonstrations and Interviews

Demonstrations and interviews will be scheduled as identified in timeline of Section 1. They will most likely be done via Zoom. One week will be designated to schedule and complete all interviews and demonstrations for your proposal submission. This section provides a description and audience attending the interviews and demonstrations. Appendix 1 includes a listing of questions.

## General Demonstration

Presentation of the Advancement Donor software solution. Answer the question; Why should GVSU implement your solution? This is an opportunity to impress the GVSU community. Questions may be submitted by staff; however, responses can be followed up after the presentation.

Duration: 2 hours maximum

Attending More than 50 staff attending including:

* Advisory Committee (15 members)
* Subject Matter Experts (approximately 50 members)
* Staff from various GVSU departments

## Technical Review Interview

Question and answer session with the technical and security staff of GVSU. Vendor should be prepared to answer questions in Appendix 1 subsections 1-6.

Duration: 2 hours maximum

Attending: Approximately 7 staff including:

* Chief Technology Officer
* Director Enterprise Architecture
* Senior Systems Database Administrator
* Chief Information Security Officer
* Director Enterprise Applications
* System Analyst
* Director of Systems and Training

## Subject Matter Expert Demonstration

Provide a detailed presentation of how the functionality of the Advancement software solution works. Allow 20 minutes at the end of the presentation for questions. This group will include the subject matter experts and staff currently editing data and reporting. Sample questions are included in Appendix 1. Specifically, subsections 7-9.

Duration: 2 hours maximum

Attending: Approximately 30 staff attending including:

* Gift Processing Staff (University Development)
* Dues and Membership Processing Staff (PBS/NPR)
* Data Manager
* Administrative Assistants
* List Manager
* System Analysts
* Prospect Research
* Director of Systems and Training

## Advisory Committee Demonstration

Presentation on the advantages of your solution to the Senior Management Staff and Advisory Committee. Allow 20 minutes at the end of the presentation for questions.

Duration: 2 hours maximum

Attending: Approximately 20 staff attending including:

* Vice President University Development
* General Manager WGVU
* Chief Information Officers
* Vice Provost of Graduate and Lifetime Learning
* Senior Strategic Sourcing Specialist
* Gift Officer
* Director Enterprise Architecture
* Senior System Database Administrator

# Section 6 - Conclusion and Wrap-up

Grand Valley State University’s request for a proposal for an Advancement Donor Solution should meet the needs of the Development Division and related functions. The current donor management solution has been used extensively for many years. Your proposal should identify the best possible solution for an Advancement Donor Solution while recommendation the migration pathway of donor and alumni data. Your responses should concisely address the requirements as they are presented in this document. If any of the requirements cannot be met as stated, this must be clearly identified in your proposal. GVSU terms and conditions of the RFP award is included in Appendix 2.

Proposals submitted may be reviewed and evaluated by any person at the discretion of GVSU, including non-allied and independent consultants retained by GVSU now or in the future for the sole purpose of obtaining evaluations on the proposals.

Vendors are expected to submit their best bid in response to the RFP. GVSU will notify vendors, following completion of the award process, whether or not vendors have been awarded the bid. Any vendor may be asked to further explain or clarify areas of their proposal in writing during the evaluation process.

# Appendix 1 – Detailed Questions

Questions included in the appendix have been identified as important to having a clear understanding before the RFP will be awarded. Many of the questions will be brought up during the interviews and demonstrations. Answers to the questions are not needed as part of the response to your submission of a proposal.

## Systems Architecture

* 1. Which major hosting platform is the hosted solution supported by your organization, Amazon AWS, Google, Microsoft Azure or other?
  2. What are the expected local systems staffing level for your solution, given an institution such as GVSU?
  3. Are there any initial configuration or implementation decisions that cannot be changed later, or altered without additional expense?
  4. How do feature enhancements, upgrades, updates, etc. take place on your system?
  5. Do any of these cause system downtime or instability? If so, what amount of downtime is to be expected?
  6. What is the uptime percentage of the proposed solution(s)?
  7. Do you have a disaster recovery plan?  How often do you test it?  In the case of a data center disaster, where do you backup our data?
  8. Does your solution provide a browser-based staff client? If browser based, which browsers are supported? How do you determine which browsers are supported?
  9. What operating systems are compatible with your staff client? What are the minimum requirements?
  10. What are client update deployment options (can this be done remotely? automatically pushed? other?)
  11. Does the staff client offer any automation features such as macros, keyboard shortcuts, or keystroke recording?

## Data Security & Data Access

* 1. Describe the physical security of the data center(s) that house the proposed solution.
  2. Will you allow GVSU to conduct penetrations tests or vulnerability scans on the server(s) where our data is stored?
  3. How does your solution ensure information is kept secure while in transit?
  4. Does your solution encrypt backup and replica data sets? If so, how?
  5. How does your solution prevent data loss? What does the data recovery process look like? Is that something we must work through with you, or can we do it on our own? How long does the data recovery process typically take? Can compartmentalized data be recovered (e.g. a subset of bib records) or does the entire system have to be rolled back in its entirety?
  6. What are your processes as related to security breaches? How quickly do you notify GVSU of a data breach?
  7. What data validation does the solution perform on records as they are created or edited? Indicate whether this is different for batch jobs as compared to single records.
  8. How does the solution track changes to records? Are changes to all record types tracked? Is there any audit trail for edits? Is it possible to revert to a previous version of a record?
  9. How has the solution been designed to comply with laws and regulations governing the storage and use of “protected” user data? Examples of such laws and regulations include: Family Educational Rights and Privacy Act (FERPA), Payment Card Industry Data Security Standards (PCI-DSS), General Data Protection Regulation (GDPR)?

## Authentication, Permissions, and Identity Management

* 1. Can your solution use GVSU’s data stores (Active Directory, LDAP) for both staff and patron accounts? How does this capability work alongside identities natively managed within the proposed solution?
  2. Do you support single sign-on authentication and authorization solutions (e.g., CAS)? Is there additional cost to support single sign-on?
  3. How are administrative rights assigned within the system? Can administrative rights be assigned to identities stored in external identity stores, such as Active Directory?
  4. Does your solution allow for group-based permissions? If so, are there any differences between what permissions can be managed for groups vs. individuals?
  5. What is the level of granularity of access controls for staff functions (principle of least privilege)? E.g., can certain data elements be made read-only for some staff and read-write for others?
  6. How are permissions to the application and database revoked?

## Integration & Extensibility

* 1. Does your solution deliver customizable, relational views of donor data? Include information about what data are available through these views, whether the views are read-only or provide update capabilities, and any export or scripting capabilities. Can these views include arbitrary data from multiple record types (e.g., bibliographic data and financial data)?
  2. What, if any, limitations exist on combining data elements from multiple record types for reporting or updating?
  3. How does your solution integrate with student-based systems (Ellucian Banner, Workday, other)?
  4. How does your solution integrate with Donor Search, LiveAlumni or other 3rd party prospect research and management solutions?
  5. Does your solution provide access to documented web services and APIs? How are the APIs accessed? Do these allow for read/write/update/delete functionality? Are there any licensing or technical restrictions placed on the use of these tools and services? Are business and access controls applied? Does the solution utilize Restful-API?
  6. What Security protocols are in place to secure data when APIs are in use?
  7. Does the company provide a service to build new connectors free of charge? Can customers leverage processes and connectors built by other customers via a community or similar sharing platform?
  8. How are screens and forms customized in the solution? Does this typically require coding or scripting?
  9. Does your solution provide for the replication of the database on a scheduled basis to the local site?
  10. Will a test environment be available for GVSU staff use on the hosted solution?
  11. What level of expertise is needed for all reporting, updating, importing and exporting functions? Identify which functions require the intervention of a database administrator or Systems/IT personnel as opposed to functions that staff can perform on their own?

## Vendor Support

* 1. What proactive monitoring of the solution do you provide? What communications to the customer can result from this monitoring? How do you alert customers in the event of planned downtime and unplanned system anomalies?
  2. Through what venues do you offer customer support (e.g. phone, web, chat, email)?
  3. What are the hours that customer support is available? What is the expected response time to a submitted issue?
  4. Do you accept support requests from any GVSU staff member or only designated representatives? Do you provide a general support contact or is support provided by specialists in functional areas (giving, biographical, prospect, membership, etc.)?
  5. What customer community activities do you support? Is there an annual user group meeting? Regional interest groups (particularly in the Midwest)?
  6. What is your product enhancement process? What role do customers play in determining and prioritizing new features and enhancements? What changes have you made to your solution within the last year that was a result of customer feedback?
  7. What is your user testing procedure?
  8. What is the frequency of both major and minor system upgrades? When are upcoming changes available for customers to preview?
  9. What type of documentation is available to customers? How often is the documentation updated? Is any user authored content available?
  10. What support do you offer for the available APIs and web services? Do all the APIs and web services have documentation?

## Migration

* 1. What is the recommended or typical migration timeline for an organization such as GVSU? Include recommendations regarding the timing, order of work, and the number of stages. What amount of staff time do you estimate will be needed to support the migration?
  2. What is the typical or recommended amount of downtime for the migration? What factors play into this recommendation?
  3. What migration services do you offer? Describe any data migration services, training, configuration, and policy planning you provide. Is all of this included in the price provided?
  4. Are there any specific considerations or difficulties that you have encountered during migrations from Millennium?
  5. Are you able to address data cleanup issues during migration (duplication, errors in constituent biographical information, etc.)?
  6. What post migration services are included in the cost to support GVSU as it uses the proposed solution? What post migration services come at an additional cost?

## Staff Functions

### General Staff Functions

* + 1. What workflows can be integrated across silos or modules to avoid repetitive data management?
    2. Does your solution allow for the batch loading of records (constituent, biographical, gift and dues, alumni, etc.) into the system? How does your solution protect designated fields from overlay? What does your solution do if it encounters multiple record matches during a batch load?
    3. Does your solution allow a level access to support table and view creation and updates?
  1. How could your solution support the ability of GVSU to utilize CASE Global Reporting Standards and VSE reporting?
  2. How has the solution been designed to comply with the Donor Bill of Rights, developed by the Association of Fundraising Professionals (AFP), Association for Healthcare Philanthropy (AHP), Council for Advancement and Support of Education (CASE) and Giving Institute: Leading Consultants to Non-Profits?
     1. How does your solution integrate with PBS/NPR broadcasting software options such as ProTrack, ACD Direct, Forest Incentives, PBS Passport (MVault), PBS payment processing (TVault), and Allegiance?
     2. How does your solution manage sustainer pledges and payments? Are there automated options for processing payments?
     3. What are your best practices to get the most out of prospect research and/or target analytics?
     4. How does your solution manage online fundraising marketing automation?
     5. How does your solution manage campaigns?
     6. Does your solution provide an easy way to customize the display of a record from the staff interface?

### Integration with Other Staff Functions

* + 1. How does your solution integrate workflows for the following?
       - 1. Entering a new constituent and biographical information (name, address, email, phone, attribute, relationships)
         2. Prospect identification
         3. Proposal tracking
         4. Action and Task tracking
         5. Gift and receipt processing
         6. Dues and Membership gift processing
         7. Stewardship and tracking of constituents and giving
         8. Event and Activity management
    2. Does your solution have ticketing options for athletic or specialty events?
    3. Describe any AI or Machine Learning solutions? Are there additional costs associated with the solutions?
    4. How are custom reports built in the solution? In what scenarios would coding and scripting be needed to generate reports?
    5. How are reports exported and shared outside the solution?
    6. Can reports be automatically generated and sent via email?
    7. Does your solution have the capability to report on custom fields?
    8. Does the solution provide externally focused dashboards to communicate with non-licensed stakeholders?
    9. Do most clients leverage third-party reporting tools with the solution? If so which ones?
    10. How does the solution support integration with third-party systems?
    11. How do you manage the connection to a 3rd party payment processing solution, specifically, PAYA payment processing?
    12. How does the solution support data transformation?
    13. How does the solution support conditional logic as part of integrations/automations?
    14. How does the solution allow customers to leverage existing integration/automation work to avoid the need for rework?
    15. Is there the ability to create SSIS packages that run on a schedule on the server?
    16. Does the system interact with GitHub?

### User/System Interaction

* + 1. How does your solution enable users to find a specific constituent? Group of constituents by attribute, relationship or constituent type?
    2. How are companies and foundations organized in your solution? For example, a parent company, subsidiaries, different addresses for the same company, corporate foundation of the company, previous names of companies or mergers). How are alumni and constituents who work at the company linked to the company as well as an individual record? How is this information regularly updated?
    3. How will your solution assist users in reporting standardized counts and financial information?
    4. How does your solution handle characters with accents and special characters?

### Interface Design and Integration

* + 1. Is your solution accessible (Section 508 compliant) to users with disabilities?
    2. How do you approach evaluating and improving the usability of your solution?
    3. What branding and customization options are available at the local level, including capabilities for setting default options? Can we add custom HTML? CSS? JavaScript?



## Training

* 1. What types of training options are available? Specifically, for the following groups:

General functionality

Data entry and update

Gift processing data entry and update

System configuration and maintenance

* 1. Are there options for remote training? Live or pre-recorded sessions?
  2. Would there be options for custom training?
  3. Are there additional costs for training options?

# Appendix 2 – GVSU General Terms and Conditions (Rev. 5.15.18)

1. The Supplier shall comply with the University’s policy and procedures (<http://www.gvsu.edu/purchasing>) and any additional instructions issued from time to time by the University.  
   1. During the period of contract, no change is permitted to any of its conditions and specifications unless the Supplier receives prior written approval from the University.
   2. Should the Firm find at any time that existing conditions make modification in contract requirements necessary, it shall promptly report such matter to the University for its consideration and decision.
   3. The Firm shall comply with any and all federal, state or local laws, now in effect or hereafter promulgated which apply to the operation herein specified.
   4. The Firm’s performance may be evaluated by a designee or an Advisory Committee of the University meeting from time-to-time during the period of contract. It will be the responsibility of the Firm to respond, in writing if so requested, to inquiries, requests for change, and recommendations.
   5. The Firm shall provide the University, with telephone numbers and addresses of management personnel and shall arrange for at least one such person to be available during the University’s normal working hours by telephone. The Firm shall also provide sufficient backup in times of staff shortages due to vacations, illnesses, and inclement weather.
   6. The Firm shall maintain applicable insurance coverage with appropriate coverage limits. The Firm shall provide the name of the primary insurance carrier and their trade rating which may apply to the operation herein specified.
2. Termination  
   1. The University may terminate this agreement for any reason, including but not limited to, changes in the market price of the products and non-appropriation of federal or state funding to university, by delivering not less than thirty days prior written notice to Supplier.   
      If termination is due to default by Supplier, Supplier shall have ten days from receipt of notice to cure the default. If Supplier fails to cure within the ten-day period, university may terminate this agreement immediately.   
      The failure of university to exercise its rights of termination for default due to Supplier’s failure to perform as required in any one instance shall not constitute a waiver of termination rights in any other instance.
3. General Terms and Conditions  
   1. The terms and conditions shall govern any agreement issued as a result of this solicitation.  
      Additional or attached terms and conditions which are determined to be unacceptable to the University may result in the disqualification of proposals. Examples include, but are not limited to: liability for payment of taxes, subjugation to the laws of another state, and limitations on remedies.
      1. Interpretation, Enforcement and Forum of Laws  
         For disputes between University and Supplier, this agreement shall be governed by, construed, interpreted, and enforced solely in accordance with the laws of the State of Michigan and the venue shall lie in Kent County.
      2. Compliance with Law   
         Supplier warrants and certifies that in the performance of this agreement, it has complied with or will comply with all applicable statutes, rules, regulations and orders of the United States, and any state or political subdivision thereof, including but not limited to, laws and regulations pertaining to labor, wages, hours and other conditions of employment.
      3. Funding Provided by Federal Contracts or Grants  
         Where federal contracts or grants provide funding to University, it is the responsibility of the Supplier and University to comply with all FAR (Federal Acquisition Regulations) applicable laws and regulations by completing any certifications and disclosures and any other requirements. When federal contract or grant funds are used on purchases under this agreement, which exceed $25,000, certification must be provided in writing that the Supplier is not debarred, suspended, or proposed for debarment by the Federal Government.
      4. Insolvency   
         In the event of any proceedings in bankruptcy or insolvency by or against Supplier, or in the event of the appointment (with or without its consent) of an assignee for the benefit of creditors, or a receiver, University may cancel this agreement without prior notice and without incurring any liability whatsoever to Supplier.
      5. Assignments   
         Supplier shall not assign this agreement or any of Supplier’s rights or obligations hereunder, without University’s prior written consent. Any purported assignment made without prior written consent shall be void and of no effect.
      6. Patent Trademark and Copyright Infringement   
         The Supplier warrants that the products/services hereby sold, either alone or in combination with other materials, do not infringe upon or violate any patent, copyright, trademark, trade secret, application or any other proprietary right of any third party existing under laws of the United States or any foreign country. The Supplier agrees, at its own expense, to defend any and all actions or suits alleging such infringements and will hold University, its officers, agents, servants, and employees harmless from any and all losses, expenses, claims, (including reasonable attorney’s fees), or judgments arising out of cases of such infringement.
      7. Use of Name, Logos, etc. in Advertising   
         Supplier agrees not to make reference to this agreement or use University logo or trademarks in any advertising material of any kind without expressed written permission. University agrees not to make reference to this agreement or use the logo of Supplier in any advertising and marketing materials of any kind without the expressed written permission of the Supplier.
      8. Indemnification  
         Supplier agrees to indemnify and hold University harmless from and against all liability, losses, damages, claims, liens, and expenses (including reasonable legal fees) arising out of or connected with the products purchased, work or services performed, or resulting from damages or injuries incurred by or to University by reason of any defect in manufacture, construction, inspection, delivery, material, workmanship, and/or design of any goods and services furnished hereunder, excepting only such liability as may result solely from the acts of negligence of University or its employees. Supplier, at the request of University, shall undertake to defend any and all suits and to investigate and defend any and all claims whether justified or not, if such claim or suit is commenced against University or its respective officers, agents, servants, and employees.
      9. Insurance  
         If fabrication, construction, installation, service or other work is specified to be conducted on University premises, Supplier shall maintain in force during the period of such work limits of liability as required by law or as set forth herein, whichever is greater: (a) worker’s compensation, as required by the laws of the State of Michigan; (b) commercial general liability for bodily injury and/or property damage in an amount of not less than $1,000,000 single limit, per occurrence; (c) automobile liability for bodily injury and/or property damage in an amount of not less than $1,000,000 single limit, per occurrence. Supplier shall provide a certificate of insurance naming University as additional insured. Supplier shall furnish to the University satisfactory proof of such insurance coverage included with Supplier’s proposal.
      10. Licenses/Permits/Taxes and Tax-Exempt Status   
          Supplier shall be responsible for obtaining all permits, licenses and bonding, to comply with the rules and regulations of any state, federal, municipal or county laws or any city government, bureau or department applicable and assume all liability for all applicable taxes.

University is a 501(c) (3) not-for-profit corporation and is exempt from state sales and use taxes imposed for services rendered and products, equipment or parts supplied.   
All prices listed and discounts offered are exclusive of sales and use taxes. Supplier has the duty to collect all taxes in connection with the sale, delivery or use of any items, products or services included herein from University (if for the purpose of resale), at the taxable rate in effect at the time of invoicing. Supplier shall comply with the tax requirements of the State of Michigan. University shall furnish to Supplier a certificate of exemption in form and timeliness acceptable to the applicable taxing authority.

* + 1. Americans with Disabilities Act   
       Supplier shall comply with all applicable provisions of the Americans with Disabilities Act and applicable federal regulations under the Act.
    2. Alcohol, Tobacco & Drug Rules and Regulations  
        Employees of the Supplier and its subcontractors shall comply with all instructions, pertaining to conduct and building regulations of the University. University reserves the right to request the removal or replacement of any undesirable employee at any time.   
       All buildings at all University locations are tobacco-free. Use of tobacco products is not permitted in any area inside any buildings. Smoking is prohibited within twenty-five (25) feet of any building, within twenty-five feet of any bus stop on University property and within twenty-five feet of the Little Mac Bridge on the Allendale campus. The Supplier is expected to respect this tobacco-free policy and fully comply with it.

The Supplier agrees that in the performance of this agreement, neither the Supplier nor any of its employees shall engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance, including alcohol, in conducting any activity covered by this agreement. University reserves the right to request a copy of the Drug Free Workplace Policy. The Supplier further agrees to insert a provision similar to this statement in all subcontracts for services required.

* + 1. Equal Opportunity   
       The provisions of Section 202 of Executive Order 11246.41 C.F.R. Sec. 60-1.1 C.F.R. Sec. 60-250.4 and 41 C.F.R. Sec. 60-741.4 are incorporated herein by reference and shall be applicable to this agreement unless this agreement is exempted under the rules, regulations, or orders of the U.S. Secretary of Labor.
    2. Non-Discrimination  
       The parties agree to comply with applicable state and federal rules governing Equal Employment Opportunity and Non-Discrimination.
    3. Sexual Harassment and Bias Incidents  
       Federal law and the policies of the University prohibit sexual harassment. Supplier is required to exercise control over its employees so as to prohibit acts of sexual harassment. If University in its reasonable judgment determines that any employee of Supplier has committed an act of sexual harassment, Supplier agrees as a term and condition of this agreement to cause such person to be removed from University’s facility and to take such other action as may be reasonably necessary to cause the sexual harassment to cease.
    4. Compliance with Specifications  
       The Supplier warrants that all goods, services, or work supplied under this agreement shall conform to specifications, drawings, samples, or other descriptions contained or referenced herein and shall be merchantable, of good quality and workmanship and free from defect. The Supplier also warrants that all goods covered by this agreement which are the product of the Supplier or are in accordance with its specifications, will be fit and subject to University inspection before acceptance, and also to later rejection if use reveals defects not apparent upon receipt; and if rejected will be held at Supplier’s risk and expense for storage and other charges after 60 days of storage, goods may be disposed of without cost to University. Neither receipt of goods nor payment therefore shall constitute a waiver of this provision.
    5. Gratuities  
       University may, by written notice to Supplier, cancel the agreement if it discovers that gratuities, in the form of entertainment, gifts or the like, were offered or given by Supplier to any officer or employee of University with a view toward securing an agreement or securing favorable treatment with respect to the awarding of this agreement.
    6. Covenant Against Contingency Fees  
       Supplier certifies that it has neither offered nor paid a contingency fee to any individual, agent, or employee of University to secure or influence the decision to award this agreement to Supplier.
    7. Suspension or Debarment   
       University may, by written notice to the Supplier, immediately terminate the agreement if it is determined that the Supplier has been debarred, suspended or otherwise lawfully prohibited from participating in any public procurement activity, including but not limited to, being disapproved as a subcontractor by any public procurement unit or other governmental body.
    8. Conflict of Interest  
       In order to avoid even the appearance of any conflict of interest, neither University nor Supplier shall employ any officer or employee of the other party for a period of one year from the date hereof.
    9. Strikes or Lockouts  
       In the event Supplier should become involved in a labor dispute, strike or lockout, Supplier will be required to make whatever arrangements that may be necessary to ensure that the conditions of this agreement are met in their entirety. Should the Supplier be unable to fulfill its obligations under this agreement, University shall have the right to make alternative arrangements to ensure the satisfactory performance of the agreement during the time Supplier is unable to perform the required duties. Any costs incurred by University, as a result of such job action, shall be reimbursed by the Supplier.
    10. Force Majeure  
        Neither party shall be held responsible for any losses resulting if the fulfillment of any terms or provisions of this agreement are delayed or prevented by any cause not within the control of the party whose performance is interfered with, and which by the exercise of reasonable diligence, said party is unable to prevent.
    11. Modification of Terms  
        No waiver or modification of any of the provisions hereof shall be binding unless mutually agreed upon by University and the Supplier, in writing, with signatures of authorized representatives of all parties authorizing said modification.
    12. Continuation of Performance through Termination  
        Supplier shall continue to perform, in accordance with the requirements of this agreement, up to the date of termination, as directed in the termination notice.
    13. Proprietary/Confidential Information  
        University considers all information, documentation, and other materials requested to be submitted in response to this solicitation to be of a non-confidential and/or non-proprietary nature and therefore shall be subject to public disclosure. Supplier is hereby notified that University adheres to all statutes, court decisions and the opinions of the State of Michigan regarding the disclosure of proposal information.

All information, documentation, and other materials submitted by Respondent in response to this solicitation or under any resulting contract may be subject to public disclosure under the Freedom of Information Act.

* + 1. Strict Compliance  
       The parties may at any time insist upon strict compliance with these terms and conditions, notwithstanding any previous custom, practice or course of dealing to the contrary.
    2. Entire Agreement  
       This agreement together with the Exhibits annexed hereto constitutes the entire agreement between the parties and supersedes all prior agreements whether written or oral between the parties. Documents subject to Freedom of Information Act will only be released after award.
    3. Prevailing Wage Rates  
       If and where applicable prevailing wage rates apply. Prevailing wage rate information may be included with this document. However, if not, it is the responsibility of the bidder to obtain any and all appropriate prevailing wage rate information.
    4. Addendums  
       If any vendor addenda(s) and or exhibit(s) conflict with University specifications, terms and conditions, University terms and conditions will prevail.



**PROPOSAL FORM**

**Advancement Donor Management Solution • RFP #222-20**

1. The undersigned certifies that to the best of his/her knowledge:

There is no officer or employee of Grand Valley State University who has, or whose relative has a substantial interest in any contract award subsequent to this proposal.

The names of any and all public officers or employees of Grand Valley State University who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as part of this submittal.

Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. The undersigned further certifies that their company \_\_\_\_ IS or \_\_\_\_IS NOT currently debarred, suspended or proposed for debarment by any federal entity. The undersigned agrees to notify the University of any change in this status, should one occur, until such time as an award has been made under this procurement action.
2. Bidder declares the following legal status in submitting this proposal:

A partnership

A corporation organized and existing under the laws of the State of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

An individual doing business as (DBA) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. (Optional) Bidder declares that company is at least 51% owned, controlled and actively managed by

(check all that apply):

African-American Native American Woman/Women

Asian American Multi-Racial ADA Disabled Person(s)

Hispanic American

1. Bidder acknowledges receipt of the following addenda:

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. BASE PROPOSAL SUM: \_\_\_Attach Proposal\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_dollars

($\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

1. The undersigned proposes to furnish all labor, materials, equipment, tools and services required to complete the work in accordance with the proposed Contract Documents listed herein, including all addenda issued pertaining to same, for the sum or sums as stated, and agrees that these Documents will constitute the Contract if accepted by Grand Valley State University.

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Company Name

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Address City/State/Zip Code

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Office Phone No. Cellular Phone No. Fax No.

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Authorized Agent Signature Name & Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Witness Signature Name

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Tax Identification No. Date

VIII. ACCEPTANCE: This proposal is accepted by Grand Valley State University

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Authorized Agent Signature Name & Title

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Witness Signature Name

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GVSU Tax Identification No. Date