GVSU Responses to Questions 01-04-21
RFP #222-20 Advancement Donor Management Solution

Responses to questions are in bold following each question.

1. (2) What is the average number of new records added annually?

**Approximately, 16,033 new constituents added annually.**

1. (2) How many records does GVSU anticipate being in the new Advancement Donor Management System 3 years from contract sign off date?

**Approximately, 535,000 total constituents in 3 years.**

1. (4.5, 7.4.2) Describe in more detail the types of events that need to be supported (single events, reunion/homecoming, golf tournaments, gala, others etc.?).

**Event types include:**

 **Formal dinner events (50 – 1,000 guests)**

 **Presidents smaller dinner engagements < 20 guests**

 **Mid-sized events (20 - 250 guests)**

 **Wine and Cheese events informal events (50 – 100 guests)**

**Largest Events:**

**Enrichment Dinner: 1,000 guests. 5 course meal, hosted in a ballroom. Seating guest by table (8-10 seats per table).**

**Scholarship Dinner: 500 guests. Appetizers and drinks. Coordination required between donors and related scholarship students.**

**Events use registration, attendance, table hosting and seating options. We would like a more robust seating option. Perhaps an option to integrate guest seating restrictions (food allergies, personality conflicts, etc.). We currently track attendance through name tags pickup and will connect our actions and tasks to follow up with a guest.**

**We currently use ticket tracking in Millennium and through the content management system (CMS). We would like to more closely integrate with giving options and registration for mid-sized events. We have in excess of 100 events annually. Event registration and payments are handled separately.**

1. (4.5, 7.4.2) Please describe the types of ticketing required?

**At a minimum, we would like to have a simple ticketing system where a guest may register for an event and receive a ticket as a follow up, we currently process ticketing manually. We also manually process quid pro quo and gifts independently.**

1. (4.5) Is the intent for the new Advancement Donor Management System to manage event information only or to also include online event registration functionality?

**We would like the option to move to an online event registration functionality. However, we currently use a custom Oracle database and would like a way to integrate the registrations. We are open to all options to automate processes.**

1. (2, 7.4.11) Is supporting and integrating with PAYA Payment Solutions for credit card processing required or open to other options?

**We are open to all options. We need a way to process 300 to 500+ giving transactions daily.**

1. (4.4) Please describe in more detail “integration” regarding this question. “Does your solution support Public Broadcasting PBS/NPR integration?”.

**Our current solution uses a recurring gift model for monthly membership. We currently support this model and would like to continue to utilize a membership-based subscription service to PBS/NPR. There are several thousand membership transactions processed monthly.**

1. (7.3.1) Is your organization currently using ACD Direct and PBS Passport?

**Yes, we use both and we would like to use an API or automated transfer of data into the new Donor Advancement system.**

1. (7.3.1) Is your organization currently using Allegiance? If yes is the intent to replace Allegiance with the new Advancement Donor Management Solution being proposed to continue using Allegiance and integrate the data with the new Advancement Donor Management Solution?

**We currently do not use Allegiance.**

1. (7.3.4) What type of online fundraising marketing automation is required? What is currently being used for online fundraising marketing automation?

**Online fundraising marketing automation is optional. If you do not wish to include this option in your proposal, please indicate “Not included” as a response. We currently have a custom system we use in creating content for online fundraising. We also use Emma email marketing. We are also investigating 3rd party options. We use API technology to track email opens, clicks and opt-outs. We would be interested in other options that may improve processes.**

1. (7.3.5) Can you please clarify “campaigns”? Fundraising campaigns (ex: capital campaign, comprehensive campaign). email marketing campaigns, other?

**We are interested in comprehensive campaigns and optional email marketing campaigns. Specifically, we are interested in managing complex requests from our gift officers with limited staff. We are interested in innovative solutions.**

1. What other CRM systems are currently in use at GVSU in support of the student/alumni lifecycle from recruitment through graduation?

**We currently use Banner for student information. However, upon graduation from GVSU, alumni are imported into Millennium.**

1. The RFP Background notes you currently have 105 named users and also states 7 for "department usage". How do these relate to each other? How many users do you expect need to be licensed to use the new Advancement solution, and what is the breakdown by business function (i.e. # of users making up major giving offices, annual fund, gift and records processing, Information Technology, executive leadership, etc.)?

**Some of the 105 GVSU licensed users are located outside the University Development Division. We coordinate data entry and updating in the Development Division, WGVU and Alumni Relations departments. Access is given by experience and job position. The breakdown of our current license pool is listed below**

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| --- | --- |
| **Licenses** | **Description** |
| **23** | **Position Open – Positions to be filled, will be reclassified to Director or Director Advanced.** |
| **24** | **Advanced – Read and Write access to most data. Delete access is restricted.** |
| **8** | **Basic – New users to the system or temporary staff.** |
| **12** | **Director – Executives and Directors needing read access, some write access.** |
| **13** | **Director Advanced – Support staff to the Executives and Directors. Read and write access to most data.** |
| **3** | **Dues Processing - Advanced access with additional read and write access to WGVU gift processing.** |
| **3** | **Editor - A step above the basic level.**  |
| **3** | **Gift Processing - Advanced access with additional read and write access to Development gift processing.**  |
| **5** | **Read Only - Read only access to biographical and event constituent information.** |
| **11** | **mill - Super users, administrators, full access to all data, system and reporting.**  |

1. "Does your solution support Public Broadcasting PBS/NPR integration?" Please provide more information about what data from your Public Broadcasting PBS/NPR solution that you would like to integrate with our solution.
**Our current solution uses a recurring gift model for monthly membership. We currently support this model and would like to continue to utilize a membership-based subscription service to PBS/NPR. There are several thousand membership transactions processed monthly.**
2. Are there specific metric targets identified in support of your stated goals to increase fundraising, improve PBS/NPR business functions, strengthen alumni relations, and improve collaboration throughout the university?
**We track monthly fund raising. Most KPI’s are calculated through a series of reports and manual queries. We would like to automate gift officer specific goals and metrics.**
3. What other solutions are in use by the Development Division in addition to Millennium, in particular supporting front line fundraising, event management, digital marketing (bulk email and text messaging), tele fundraising, matching gift support? Are you intending to continue using any of these or are you open to eliminating or replacing any of them as part of a new solution?

**We currently use Emma for email marketing and have a custom content management system to support our online-giving system and we use the Millennium functionality. We are interested in options to optimize and keep costs low.**

1. How many marketing/bulk email messages are sent in total on an annual basis to your constituents?

**We currently send approximately 3.2 M emails annually.**

1. What email system is in use for office productivity (e.g., MS Outlook, Gmail, other)?

**We use MS Outlook for business email.**

1. Do you intend to continue using your current reporting solutions with the new Advancement solution, or are you intending or open to replace them?

**We are looking to replace the Millennium reporting structure.**

1. Tell us about your flows as prospects move from the earliest point of contact through your stages to the point of including you in their planned giving – how are they unique?  Describe any bottlenecks in your process or areas that you’d like to change.

 **We have basic prospect management capabilities. We manually track and move prospects through the donor development cycle. Our stages are: identification, qualification, cultivation, solicitation, and stewardship. We also have categories outside of the cycle for disqualification, wait list, and permanent stewardship where some of our planned gift donors reside.**

**A significant bottleneck is our ability to easily glean actionable insights from the prospect movement data.  Any sort of analysis requires running reports, and the outputs are basic (prospect name, stage, days in stage, etc.)**

 **Areas for change:**

* + **Need a user-friendly, yet comprehensive prospect management / portfolio tool. In addition to the basics, desired integrated data points include: goals/ KPI metrics (portfolio engagement, % to fundraising goal, yield & solicitation levels, etc.), proposal tracking, giving history, pipeline forecasts, capacity ratings, etc.**
	+ **Visual and interactive**
	+ **Added bonuses:**
		- **Pushes/ reminders when a prospect has spent too long in a particular stage**
		- **Ability to identify unassigned pools for discovery, options for segmentation**
		- **Anything that can assist with automation**
1. Tell us about your last major event that you ran - what challenges did you encounter?

**The largest event is the Enrichment Dinner with approximately 1,000 guests. We currently have a need to streamline events occurring in a short time frame. Our large events take approximately 1 year to plan.**

1. When your staff members are processing donations, what tasks take the most time?  If they could change anything about the process, what would they change?  How do gift clubs and membership programs fit into the equation?

**The most time-consuming steps for processing gifts and pledged would be vetting constituent names, addresses and contact information. Streamlining and automating this process would be helpful, it is currently very manual. Memberships are based on giving levels to specific funds.**

1. What about your processes causes your solicitors to complain the most?  What tasks are the most difficult for them to complete?

**We currently have a lot of new staff and need better training materials and guides.**

1. What causes your constituents to get frustrated with you?  What do they wish they could do that they can’t?

**We would like to streamline processes involving any internal and external constituencies.**

1. What happened the last time that you tried to identify and work with potential major donors?  What change do you think that you could make which would have the biggest impact on your overall yield? Where would you like to enhance your capabilities around this?

**An example that comes to mind is a high-capacity alum. This person came to our attention from a wealth screening. He accepted a meeting with a gift officer, and mentioned that he has a strong affinity for our university but has felt disconnected over the years. We learned about his passions and desire to provide significant support in a certain field.**

**This success story is in part the result of a name that happened to be screened and manually pulled on a high-capacity list. Changes that would provide the biggest impact from a prospect research perspective are the abilities to identify similar prospects, and refer them to gift officers so they can start building relationships earlier. A system that could automatically flag high potential prospects and create pools for discovery (and that works in tandem with the overall prospect management/ portfolio tool) would be a huge help in this effort.**

1. What features do you like about your current system that you’d want to retain?

**We have complete access to the database and are able to manage the database as needed. We also have a matching test environment with refreshing data bi-monthly.**

1. What happens if you don’t do anything and stay on your current system?

**N/A**

1. How quickly would you want to begin an implementation and be live on a new system?  Do you have any driving factors that we need to be aware of from a scheduling perspective?

**We would like to begin as soon as possible. We would like to be on the new system by March of 2023.**

1. Please tell us about any anticipated upcoming staff, policy or institutional changes that could impact how your area operates?
**A new Vice President of University Development has been hired Fall 2021. We are currently working to replace additional staff and get back up to full staff. We would like to move the department forward in technology.**