



CENTRAL
MICHIGAN UNIVERSITY

Request for Proposal
2-AM0026 Advancement Alumni & Donor Relationship
Management System with Reporting and Analytics Solution

Issue Date: February 28, 2023

Due Date: March 31, 2023

Issued By:

Amber Marr
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Central Michigan University
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About CMU

Central Michigan University is a nationally ranked institution that fosters the transformative power of advanced learning while embracing a sense of community among our students, faculty, staff and more than 245,000 alumni around the world.

Established in 1892, CMU has more than 11,000 students on its Mount Pleasant campus and more than 3,000 enrolled online and at global campus locations across North America.

From our roots as a teachers' college, CMU has grown to offer nationally acclaimed programs in areas ranging from the health professions and engineering to business and communications, and science and technology. CMU offers approximately 300 academic programs at the undergraduate, master's, specialist, and doctoral levels.

Mission Statement:

At Central Michigan University, we are a community committed to the pursuit of knowledge, wisdom, discovery, and creativity. We provide student-centered education and foster personal and intellectual growth to prepare students for productive careers, meaningful lives, and responsible citizenship in a global society.

University Vision Statement:

Central Michigan University, an inclusive community of scholars, is a national leader in higher education inspiring excellence and innovation.

Core Values:

To achieve our mission, we adhere to the core values of integrity, respect, compassion, inclusiveness, social responsibility, excellence and innovation.

No drugs, tobacco, alcohol and any other controlled substance will be allowed on the campus of Central Michigan University.

CMU, AN AA/EO INSTITUTION, STRONGLY AND ACTIVELY STRIVES TO INCREASE DIVERSITY AND PROVIDE EQUAL OPPORTUNITY WITHIN ITS COMMUNITY. CMU PROHIBITS DISCRIMINATION AND HARASSMENT OF PERSONS BASED ON AGE, COLOR, DISABILITY, GENDER, GENDER IDENTITY, GENDER EXPRESSION, GENETIC INFORMATION, FAMILIAL STATUS, HEIGHT, MARITAL STATUS, NATIONAL ORIGIN, POLITICAL PERSUASION, RACE, RELIGION, SEX, SEXUAL ORIENTATION, VETERAN STATUS, OR WEIGHT.

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Article I. PROPOSAL INSTRUCTIONS

Section 1.01 CMU Representative. Questions and/or comments regarding the proposal instructions and conditions, the scope of services, or any other matter arising under this Request for Proposal (RFP) may be directed to:

Amber Marr
Senior Buyer, Contracting and Purchasing Services
Central Michigan University
Warriner 301
Mt. Pleasant, MI 48859
(989) 774-1737
rfp@cmich.edu

Section 1.02 Schedule of Events.

- (a) RFP Issued: Tuesday, February 28, 2023
- (b) Bidder Questions Due: 3:00PM EST, Tuesday, March 14, 2023
- (c) CMU Response to Questions Due: 3:00PM EST, Friday, March 17, 2023
- (d) Proposals Due: 3:00PM EST, Friday, March 31, 2023
- (e) Post Bid Demonstrations / Interviews: Estimated weeks of April 17 - 28, 2023
- (f) Sandbox environment availability: for 60 days following Demonstration
- (g) Contract Award and Execution: Targeted by July 31, 2023
- (h) Implementation to begin: Targeted for August 1, 2023

Section 1.03 Contents of Proposal. Bidder's Proposal shall be comprised of the following:

- (a) Bidder's Proposal
- (b) Proposal Compliance Form (Attachment A)
- (c) Exceptions to RFP (Attachment B)
- (d) Vendor Disclosure Statement (Attachment C)
- (e) Proposal Checklist (Attachment D)
- (f) Functional and Technical Requirements (Attachment E)
- (g) Pricing Spreadsheet (Attachment F – Template Suggestion)

Section 1.04 RFP Clarification.

Any questions pertaining to this RFP, including any attachments, exhibits, and other documents, shall be submitted to Amber Marr at rfp@cmich.edu by March 14, 2023. Responses to any submitted questions will be answered via written addendum provided to all participating Bidders by March 17, 2023.

Section 1.05 Bidder Qualifications. To be considered for an award, Bidder must:

- (a) Be legally authorized to conduct business in the State of Michigan.

Section 1.06 Submission of Proposal.

- (a) One (1) electronic copy of Bidder's proposal in digital file format shall be submitted via email to rfp@cmich.edu with the subject line "RFP 2-AM0026 ADVANCEMENT ALUMNI & DONOR RELATIONSHIP MANAGEMENT SYSTEM WITH REPORTING AND ANALYTICS SOLUTION- [Name of Bidder]" by 3:00PM EST, Friday, March 31, 2023. Multiple attachments to the e-mail are acceptable and encouraged. Late proposals will not be considered and will be returned to Bidder as non-responsive.
- (b) Bidder shall clearly state any exceptions to, or deviations from, the provisions, terms, and conditions of the Proposal Documents. Such exceptions or deviations will be considered when evaluating the proposal. Any exceptions should be clearly stated on the Exceptions to RFP Form (Attachment B) and included in Bidder's submitted proposal. Failure to state any exceptions will be deemed as acceptance of the terms and condition of the RFP.
- (c) Prior to the submission deadline, any proposals submitted early may be withdrawn only by written notice to CMU. Such notice shall be received by CMU prior to the submission deadline.
- (d) Withdrawn proposals may be resubmitted up the proposal submission deadline, provided that they are fully in compliance with these terms and conditions.
- (e) No proposal may be modified or withdrawn for a period of one-hundred and eighty (180) days after the submission deadline.
- (f) All proposals, including any information contained therein, becomes the property of CMU and will not be returned.

- (g) The laws of the State of Michigan require the contents of all proposals be placed in the public domain and be open to inspection by interested parties. Trade secrets or proprietary information that are recognized as such and are protected by law may be withheld if clearly identified as such in the proposal. Proposals marked entirely as confidential or proprietary may be rejected. Pricing information and other offers cannot be considered confidential or proprietary. Failure to list all confidential or proprietary information within the space provided on the Proposal Compliance Form shall relieve CMU of any responsibility should such information be intentionally or unintentionally disclosed.
- (h) Failure to comply with the requirements of this RFP or any evidence of unfair proposal procedures may be cause for rejection of the proposal. Failure to supply any information requested may also be cause for rejection of the RFP as being non-responsive.
- (i) All costs incurred by the Bidder in the preparation and delivery of the Submission or in anticipation of receiving a contract from CMU are those of the Bidder and will not be reimbursed.
- (j) CMU reserves the right to accept or reject any or all proposals and to waive any irregularities, technicalities, or informalities. This RFP does not commit CMU to make an award. CMU further reserves the right to request clarification or additional documentation after the due date and time for proposal submission.

Section 1.07 Evaluation of Proposal.

Evaluation of all submitted proposals will be performed by a review committee comprised of members of CMU's Contracting and Purchasing Services and the Advancement Donor Management Steering Committee. The evaluation will be based on the following criteria (listed in alphabetical order):

- (a) Bidders demonstrated understanding of scope of services and deliverables,
- (b) Cost of Services,
- (c) Qualifications and Experience of Bidder,
- (d) Response to requirements as set forth in Article IV and Attachment E, and
- (e) Responsiveness to RFP terms and conditions,

Section 1.08 Basis of Award.

CMU will evaluate all submitted proposals based on the criteria above and will award to the Bidder whose proposal is deemed to be most valuable to CMU. Bidder's submission of a proposal constitutes recognition and acceptance of the evaluation method. Bidder acknowledges that subjective judgments may be used by CMU during the evaluation process.

Section 1.09 Formation of Agreement.

CMU may take the following actions in order to form final agreement with the selected Bidder:

- (a) Accept a proposal as written by issuing a Notice of Award letter to the selected Bidder.
- (b) Enter into negotiations with one or more Bidders in an effort to reach a mutually satisfactory agreement. Should CMU and Bidder(s) be unable to successfully negotiate a mutually acceptable agreement, CMU shall have the right to reject the originally selected Bidder's proposal and enter into other negotiations with other parties without penalty to CMU. See Article III: Terms and Conditions of Agreement for additional information.
- (c) Issue a post-proposal addendum.

Article II. SCOPE OF SERVICES

Section 2.01 Overview.

This Request for Proposal (RFP) is issued to solicit proposals from qualified, experienced, financially sound, and responsible firms to provide functionality in the areas of Donor Relationship Management, Donation/Giving Management, Reporting and Analytics, and recommended system implementation partners. CMU understands that multiple systems maybe proposed as part of a bidder's solution as well as that not all requirements may be met by a bidder. We encourage bidders to respond clearly indicating the functionality able to be met.

Additionally, CMU seeks recommendations for implementation partners for the proposed solution, this may include in-house services of the bidder or external companies with experience implementing proposed solution.

Central Michigan University seeks new solutions to enhance its team of individuals handling and processing over \$19 million in gifts annually; raise external funds to support the activities of the University. Currently, CMU utilizes Millennium by Community Brands in an on-premise installation as well as Fundraiser Performance Management by Blackbaud for its donor / constituent management, events management, gift tracking, and more. Additional applications are used in a variety of capacities including but not limited to thank you communications (ThankView), call center and giving website operations (RNL), credit card transactions (Braintree).

Statistic	Quantity (Average Annual)
Constituents	408,923
Gift Transactions (FY2022)	126,464
Named User Licenses	75
Fund Raising 3-year average	\$21,823,364
Total Donor Count 3-year average	27,803

Alumni	11,369
Events	180

Section 2.02 Scope of Services.

The scope of functionality to be addressed include this section and Attachment E, Functional and Technical Requirements.

CMU understands that solutions presented may be comprised of more than one system as well as that a vendor may only meet some of the requirements. As an overview, below are core functional areas with key scenarios CMU seeks a new solution to meet.

- **Stewardship**
 - After a gift is received and processed, send the constituent/donor a digital or physical thank you with an impact message from a student, faculty member or University Leader. Trigger the creation of tasks/workflows to facilitate process.
 - Facilitate the creation of events with the University President by identify constituents/donors to be invited based upon giving history or status in the Donor Development process. Track RSVPs (accepts and declines) in relation to the event. Trigger the creation of tasks/workflows to facilitate process.
 - General document management in accordance with Gift Acceptance Policy Standards (GAPS) including preparation and acceptance of gift agreements (reviews, approvals, signatures, fiduciary responsibility indication, accounting services notice/setup, etc.).
 - Trigger the creation of tasks/workflows when gifts are made, setting them up for management/follow-up with indication of types (scholarships, operations, etc.) including notifications to appropriate University areas.
 - Ability for staff outside advancement to retrieve key information about the award requirements, including full gift agreement.
 - Ability to create digital and physical letters, invitations, etc. that can be emailed or sent to a printing vendor for physical creation and distribution
 - Scenarios
 - Stewardship team receives an alert that it is time to confirm population for the upcoming president's lunch, once done invites are sent in accordance with plan built including emails, text messages and request for development officers to make phone calls to constituents.
 - A new gift agreement is ready for review and approval. Ability to centrally store the document and electronically route for reviews and approvals. Ensuring approvals are kept historically regarding of personnel changes.
 - A new giving fund has been established and should appear on CMU giving websites and mobile applications, Stewardship team indicates this on the gift. An integration job runs automatically adding the new fund

with appropriate information to those websites and mobile applications. Stewardship team member is prompted if any information is missing prior to the job run.

- **Donor Strategies and Constituent Engagement**

- Facilitate all facets of fundraising activities.
- Workflow and reporting on existing and newly identified constituents. Including raising of notices on profile data updates, potential opportunities, upcoming event inclusion, solicitations, etc.
- Ability to pull population reports by geographic locations for constituent outreach.
- Ability to set fund raising goals and review progress including recommendations on how to get back on track if needed. Proactive alerting and task generation when underperforming.
- View constituent profiles with varying amounts of detail.
- Plan follow-up activities/interactions for a constituent; including starting of predefined workflow processes.
- Scenarios
 - Development Officer completed a discussion with a potential donor, they complete the contact report including selection of the standard workflow applicable for follow-up steps such as a thank you email in 1 hour, includes them in the hard copy mailing next month, adds a task for the Development Officer to call them in 2 weeks.
 - Development Officer logged in this morning, sees their dashboard with goal progress and receives any alerts on new data available as well as focus tasks to be on track to meet their goals.
 - College of Arts and Media is holding an event, working with their Development Officer they run the constituent match report and to find potential invitees. This generates a code for inclusion on the invites that pulls in the interaction for those constituents, indicates opened or not, attending or not, etc. The college is able to see the brief donor profile for each as well for specific follow up. Development Officer is able to setup any specific tasks from their end also.
 - Nightly load of patent application information occurs, it finds 2 new patent applications for constituents. They are added to the constituents record and the Development Officer is notified. Additionally, as there is a rule setup if the constituents are current students, then the College Dean appropriate is notified and receives an email.

- **Prospect Research/Prospect Management**

- Identify constituents that are not assigned to a Development Officer based upon data imported/received recently.

- Manage stages of the constituent lifecycle – Identification, Qualification, Cultivation, Solicitation, Stewardship, Future, Lifelong, etc.
- Constituent hand-over process management between teams such as Research, Development Officer, and Stewardship.
- Generate constituent profiles (brief / quick and in-depth, see Attachment E for data elements to be included) for an individual donor, company, or foundation.
- Facilitate wealth screening process and scoring either natively or via third-party vendor.
- Proactively check for data quality and send notifications to the correct group when data is out of tolerance.
- Identify events like marriage, death (Obituary), birth checks, etc. either natively or via third-party vendor. Append data to constituent and trigger the creation of notifications, tasks and/or workflows to facilitate process.
- Identify events in the news media or social media either natively or via third-party vendor. Append data to constituent and trigger the creation of notifications, tasks and/or workflows to facilitate process.
- Scenarios
 - Research team receives alert that based upon automated import of social media data the night before three individuals that previously had not liked CMU recently did on Instagram. Research team includes them in new batch of potential donors for discussion with Development Officers and for the one that is alumni notifies Alumni Engagement team.
 - Research team opens a donor profile and sees detailed information on their interactions/involvement with CMU. This donor was a student from 2015-2018 and did not complete their degree, was a member of the Student Government Association, served as a Residence Hall Advisor in Wheeler Hall in 2016 and lived in Barnes Hall in 2015.
 - Research team receives alert that the new wealth screen scores are ready for review and confirmation prior to application on constituent records. Once confirmed they are applied as appropriate, if new constituents need to be created, they are in an under-review state for records to complete data validation/ collection.
 - Social media integration pulls in updated activity, interests, and key info twice a day automatically triggering any special notices.
 - Notification is received that a constituent has passed away, the obituary workflow runs checking for the CMU defined indicators and provides the outcome to the Research team for verification on if a sympathy card is sent.
 - After nightly data loads are processed, the system will generate notices to users who pulled reports and / or data in the previous 5 days that included contact information that changed during the nightly data loads.

- **Annual Giving**

- Solicit gifts from potential constituents.
- Facilitate call center, phone-a-thon and constituent outreach; including generation of statistics/analytics information to measure effectiveness.
- Generate reports and dashboards for outreach efforts, ensure interactions are noted on constituent accounts.
- Scenarios
 - Giving Tuesday date is identified, and Annual Giving team prepares the campaign several months prior outlining the cadence of emails, social media posts, mailings, etc. to be sent. Then identifies the population to be included in each (may be different or the same for each type); athletics, development officers and others in the system see that and are able to be watchful of duplicate campaigns and donor outreach.

- **Alumni Engagement**

- Event creation, oversight, and RSVP management.
- Generate reports, notifications and/or workflows for constituents to receive gifts/recognition/etc. for constituent life events (birthdays, marriages, births, etc.).
- Subscription based membership management (i.e. CMU Gold membership program)
- Ability to pull population reports by geographic locations for constituent outreach and management.
- Scenarios
 - Alumni Engagement team runs match report for alumni with accounting degrees and working in the field within 100 miles of Kansas City, KS to support an event that an area company has agreed to sponsor. Based upon the list, Alumni Engagement team coordinates invite distribution, response tracking, College Development Officer, Admissions Recruiters and Athletics Development Officer (if appropriate) awareness notices.
 - Generates list of reported alumni / mentors to be highlighted based upon University Partner sharing.
 - Alumni Takeover weekend is scheduled, pre-build campaign including population identification and schedule its distribution.

- **Athletic focused Donors / Gifts**

- Reporting based on donor/constituent category (i.e., Athletic focused donor reporting)
- Generate constituent lists for focused campaigns.
- Tools allowing development officers to conduct constituent outreach and solicitation.
- Scenarios
 - Athletics pulls query of constituents with an interest in men's basketball and prebuilds a scheduled campaign to target them for solicitation after the

expected game win on Sunday with separate messages to current season ticket holders, constituents who purchased one game tickets this season and previous buyers / donors. If win occurs, Athletics triggers the campaign to begin.

- Athletics is prompted to confirm the baseball season ticket holders' campaign that will be running in 1 week.

- **Records**

- Tools for ensuring data quality and constituent data accuracy.
- Scenarios
 - Records receives notice of the monthly address verification having been completed. This is an automated process that runs automatically confirming address validity, the Records team reviews the exception reports and processes accordingly.
 - Obituary, marriage, and news article imports run automatically and updates constituent records, where needed Records and Research are prompted to confirm. Alerts are sent to appropriate persons or groups.
 - Records staff are able to run report of integration processes and review activity including items to be reviewed, errors encountered, and last run date/time. Additionally, any errors encountered or unable to run notices-initiated tickets in CMU's ticketing system, TeamDynamix, and those ticket IDs are noted for reference/follow-up.
 - Nightly data load processes run, this brings in recent graduation, employment (faculty, staff, and student), enrollment changes, utilizing previously established rules as well. The next day, CMU individuals can see that George's record has been updated reflecting their graduation, and as such the end of their graduate assistantship as no other active programs for him; while on Clarice's record the updates include her graduation, and because a new program not yet completed and with active enrollments exists her graduate assistantship remained.
 - Records staff make contact information updates, when updating Andrea's record, they are alerted that 3 days ago she was included in a list to be included in an Athletics campaign. The Records staff are presented with options to notify the appropriate Athletics campaign owner, have the updates reflected in the campaign or do nothing. If notification to the campaign owner is not selected, they are prompted when accessing the system that contact information for some individuals has changed.

- **Gifts Received Processing and Receipting**

- Tools to receive all gifts (mail, electronic, etc.) and attaches to constituent record, automatically if possible.
- Scenarios

- Mail is received and Gifts Entry staff receive envelopes to be processed, they scan the envelopes in a batch and the system brings up the list of donors, if no match, it is flagged and sent to Records staff for handling. They match pledged or solicited donations and apply to donor records.
 - Gifts Entry staff receives alert that credit card donations file from previous day (automatically processed as integration to pull & process file was setup) has processed and is ready for confirmation including indication of no matched constituent and other predefined exceptions. They review and process accordingly.
 - CMU Employee selected payroll deduction during giving; payroll ran, and the funds were moved into designated account. The gift overall was previously entered for the employee; the payroll run adds confirmation of funds received entry. Gifts Entry staff runs exception and verification reports to confirm payroll deducted funds were applied to correct accounts and funds.
- **Reporting / Analytics**
 - Focused dashboards with high level and detailed views.
 - Scenarios
 - Joel in the President's Office is seeking a list of constituents who have donated more than \$100,000 to CMU in the past year. Joel is able to access available reports that include key notes/information around business rules used and the group to contact with questions. Joel finds the report wanted, runs it with the parameters/filters needed and receives the list of constituents. Included on the report is indicator that two of the constituents have reached the lifetime giving level and a different three (3) do not want to be emailed by CMU thus their email is not included on the report.
 - Advancement staff retrieve a report of analytics showing usage of the mobile application, website and giving page information.
 - Ensure security is setup to ensure users are only able to generate appropriate reports as well as see data appropriate to their role. For example, a College Dean would be given access to different reports and able to see different data than a Development Officer.
- **Constituent Perspective**
 - Web and mobile interfaces to update constituent specific information (addresses, phone numbers, emails, employment, interests, etc.)
 - Scenarios
 - Micah received an e-mail from CMU with a link to sign-up for a Gold Membership and link to portal to review their previous giving. Micah is able to log in (resetting their password securely), see previous giving including impact of that giving and sign-up for a Gold membership.

- Julia previously gave to CMU and is seeking documentation of that donation; Julia goes to CMU's website and finds a link to the donor portal and is able to login. Upon login can retrieve past giving information including applicable tax documentation.
- Guy has donated to CMU through many programs, Athletic events, specific college events and is actively seeking talent through CMU's Career Services office. Upon login, they are able to see their previous giving, involvement and upcoming commitments.

- **University Partners**

- Ability to integrate with other university systems including the Student Information System (SIS), financial system and scholarships and financial aid system(s).
- Ability to create relationships between donations, awarded scholarships and the students receiving the scholarship.
- Log constituent attendance to events
- Scenarios
 - Career Services is engaging with a company about coming to campus to interview students, as part of the preparation they'd like to generate a profile of the company/foundation showing their involvement with the University.
 - A new scholarship gift has been received, as part of final steps the ability to indicate it should be posted on ScholarshipUniverse and other CMU websites. The indicator would provide automated posting where possible and notifications to appropriate teams where manual posting is needed.
 - College Dean and / or Department Chair want to know their current available awards to market to current and prospective students. They pull their report seeing available awards including balances available, upcoming disbursements and upcoming fund deposits. The user is able to click on the award to see more information such as requirements, the entire gift agreement, limitations, relevant dates, and previous awarded students.
 - CMU graduation was held, and Registrar's Office has confirmed degree requirement completion and the graduates with graduation information are ready for processing including role change from student to alumni. This process integration runs on a regular schedule including generation of exception reports to the Records team.
 - A donor came to campus, the department wants to report this interaction and have it logged for Development Officer awareness as well as potential recognition. Department representative accesses a contact report form and shares the interaction as well as updated employment, interests, contact information, etc. The Development Officer is notified and the Records team for verification/validation.

- **PCI Compliance**
 - Provide signed Attestation of Compliance (AOC)
 - Describe what measures you take to always remain PCI DSS compliant.
- **Training and Personnel**
 - Describe estimated technical and functional FTE CMU will need to support delivered solution in an ongoing fashion.
 - Describe training available during implementation and post-implementation.
- **Technical - see Attachment E**, for further details, however CMU seeks proposals to provide information in the areas listed below.
 - **Access Management** – are you a member of InCommon? If no, describe authentication / single sign on methods supported.
 - Describe the degree of granularity the product supports for authorization to all resources, including workflows, screens, data elements, etc.
 - Do you allow impersonation? If so, describe how impersonation events are logged and audited.
 - **Security** –
 - Describe how your system limits access to data through interfaces and reports.
 - Describe the security standards and provide a copy of System and Organizational Controls [SOC] 2 report or equivalent certifications for all (i.e., principal and third party) infrastructure providers. Include Criminal Justice Information Security (CJIS) reports available.
 - **Infrastructure** – Describe platform and hosting options.
 - **Audit Logs** – Describe data captured and availability of the logs for users, exports to other systems, and how long they are kept.
 - **Branding** - Describe what capabilities are provided to customize branding of the user interface, including headers, footers, images, logos, fonts, etc.
 - **Business Process** - Provide a list and description of delivered business process definitions/maps/guides/etc. Include how these processes can be integrated with external applications.
 - **Communications** - Describe methods of communication (i.e., hard-copy mail, Email, Text/SMS, Mobile App Notification, etc.) available from / by the system

or through third party integrations. Describe how communication from the solution works.

- **Data Conversion** – Provide an overview of data migration options.
- **Data Services**
 - Provide a list, description and where possible an example of the standard reports delivered as part of the solution.
 - Describe what capabilities are provided for ad-hoc query and reporting.
 - Describe existing data validations/verifications available, including building of CMU custom rules/checks to be performed.
 - Describe your workflow capabilities and task assignment capabilities.
- **Integrations** - List your integration technologies include abilities to do batch and real-time data processing. Describe the business/technical functions that are Web Service / API accessible. Identify existing native integrations available. Include any Web Service / API technical documentation available.
- **Mobile Capabilities** - Describe the mobile capabilities, including apps for specific mobile devices, responsiveness in sites, any limitations on mobile device/table versions, etc.

Central Michigan University's goal and vision of its future donor/giving landscape include digital integrated systems that provide automated mechanisms to reaching new and existing constituents. Data accuracy, integrity and integrations are very important and as such CMU seeks a solution capable of both real-time integrations and batch-based integrations. While solutions will change over time, examples of existing systems for which CMU may integrate include:

- Allegiance – Public Broadcasting CRM
- Blackboard Transact – Student ID usage and tracking system
- BrainTree – payment provider
- DocuSign – electronic signature tool
- Engage by Anthology – Student advising, and engagement solution built upon Microsoft Dynamics
- Engage (formerly OrgSync) by Anthology (formerly Campus Labs) - Student Activities and Involvement tracking system for student activities (Student Affairs)
- Faculty Success by Watermark Insights, Inc. – Faculty profile information
- Fiserv – payment gateway
- Handshake – Career Services system for potential employers and position candidates to engage, hold virtual interviews and virtual career fairs
- HEP Gifts Plus – matching gift information
- CyberGrants – matching gift information
- MarketSmart – provides new prospects and other data from surveys completed

- MobileUP – mobile application for Alumni
- PeopleGrove – Alumni/Mentor engagement with current students, aka Central Connections
- QuikPay – payment provider
- SAP – CMU’s current Finance, Human Resources and Student Information System
- ScholarshipUniverse – portal for students to view and apply for scholarship opportunities
- Sigma systems ProSAM Suite – financial aid system of record
- Slate by Technolutions – Admissions application and prospective student CRM
- Tickets.com – Athletic and Theater event ticketing system (purchase of tickets (individual and season) as well as attendance/ticket usage)

Note: This is not an exhaustive list and is subject to change

Section 2.03 Implementation Services Scope.

Central Michigan University in conjunction with a new solution is seeking implementation services for the identified solution, services envisioned however not limited to are integration building, testing, training, system configurations, data migration, data validation, and knowledge transfer.

At a high level, CMU recommends the following implementation plan/strategy. If alternative order/plan is recommended present that as part of response.

- Begin implementation of the solution in August 2023:
 - 1st – System configuration, constituent setup, migration of data from Millennium (current solution) to the new solution, basic giving/donation setup, and high priority integrations (estimated 10)
 - 2nd - Constituent relationship management implementation
 - 3rd - Reporting and analytics implementation
 - 4th – All other donation management functionality implementations
- Complete implementation of solutions by April 2024 for CMU to initiate a comprehensive capital campaign.

CMU has allocated resources from Advancement, Information Technology and University Partners to assist/participate in the implementation as well as a defined decision-making structure including leadership from both Advancement and Information Technology teams. CMU is a predominantly Microsoft shop and intends to utilize the Microsoft (Office) 365 platform for oversight and organization of project documentation, timelines, and communications.

Please provide recommended implementation partners for your solution. If preferred, implementation partners may submit their own response separate from solution bidder. The timeline outlined above for responses is the same for both implementation partners and solution bidders.

For each partner provide the following:

- Name and contact information

- Why they are recommended
- Provide experience integrating with university systems of record using both real-time and batch technologies.
- Three (3) references for implementation services for solution proposed
- If available, names and resumes of individuals who may work on the implementation
- Provide information on approach to implementation and recommended implementation plan including:
 - Roles and responsibilities for CMU, Implementer, and Solution Vendor(s).
 - Risks.
 - Recommendations of timeline.
- Pricing for implementation services (see Attachment F for pricing template)

Article III. TERMS AND CONDITIONS OF AGREEMENT

Upon award, CMU and the successful Bidder(s) shall negotiate in good faith to execute an agreement to memorialize Bidder's proposal. CMU's Terms & Conditions located on the back of all purchase orders will serve as the basis and set forth the terms and conditions of that subsequent Agreement.

Article IV. PROPOSAL RESPONSE REQUIREMENTS

The University intends to retain the most qualified bidder relative to the skill levels and expertise required to provide the scope and requirements outlined in Article II and Attachment E.

Provide at minimum three (3) references per proposed system or whole solution. Where possible references should be in the higher education sector and in size comparable to CMU. For each reference provide their name, contacts with contact information (minimum email and phone number), systems being utilized and timing of their implementation/usage.

Overall, for the solution client base, identify how many are using the proposed system or whole solution as well as how many are in higher education.

ATTACHMENT A

PROPOSAL COMPLIANCE FORM

In response to Request for Proposal 2-AM0026 ADVANCEMENT ALUMNI & DONOR RELATIONSHIP MANAGEMENT SYSTEM WITH REPORTING AND ANALYTICS SOLUTION, the undersigned Bidder, having read and understood the RFP terms and conditions, hereby proposes to provide consulting services in accordance with this RFP.

Please list all information or sections that Bidder considers proprietary or confidential. Note that pricing and financial arrangements cannot be considered as proprietary information. If additional space is required, Bidder may submit additional pages, provided it is clearly marked as confidential or proprietary information.

The sections of this proposal listed below represent trade secrets or proprietary information:

(a) _____

(b) _____

(c) _____

Please provide the names of any subcontractors your firm intends to award a portion of this Work to, should your firm be awarded this proposal. Use additional sheets if necessary. If none, leave blank.

Subcontractor

Address

Phone Email

Goods/Services to be Provided

Subcontractor

Address

Phone Email

Goods/Services to be Provided

Bidder acknowledges that all content required under this RFP has been included.

Bidder states that full compliance with this RFP is maintained in this proposal submitted in response to 2-AM0026 ADVANCEMENT ALUMNI & DONOR RELATIONSHIP MANAGEMENT SYSTEM WITH REPORTING AND ANALYTICS SOLUTION

Bidder's proposal shall be good for_____ days from the submission date (minimum one hundred twenty (120) days).

Bidder understands that CMU reserves the right to reject any and all proposals, waive irregularities or technicalities in any proposal, accept any proposal in whole or in part, or make no award, whatever is deemed by CMU to be in its best interest.

Bidder hereby certifies by signing below that (a) this proposal is genuine and is not made in the interest of or on behalf of any undisclosed person, firm, or corporation; (b) that Bidder has not directly or indirectly induced or solicited any other Bidder to put in a false proposal; (c) that Bidder has not solicited or induced any person, firm, or corporation to refrain from submitting a proposal; and (d) that Bidder has not sought by collusion or kickback to obtain any advantage over any other Bidder or over CMU.

Business Name: _____

Federal I.D. Number/SSN: _____

Official Address: _____

Firm's State or Foreign Country of Residence: _____

Telephone Number: _____

Fax Number: _____

Email: _____

Authorized Signature: _____

Printed Name_____

Date _____

ATTACHMENT B

EXCEPTIONS TO PROPOSAL

Please list any exceptions to this RFP on this form. Include page number, section and reason for exception. Bidder may make additional pages if necessary.

Please check one of the following:

- ☐ We have no exceptions to this RFP.
- ☐ We have the following exceptions to this RFP:

[illegible]

ATTACHMENT C

VENDOR DISCLOSURE FORM

As a public institution of the State of Michigan, Central Michigan University (CMU) has established policies surrounding contracting with its own employees in accordance with Michigan Public Act No. 184, MCLA 15.323.

As part of this process, you, the Vendor, are asked to disclose any and all potential conflicts of interest to CMU for appropriate review. Examples of potential conflict include, but are not limited to, a University faculty/staff member or household is an actual or beneficial owner of more than 5% of the voting stock or is an officer, director, trustee, sole proprietor, partner, employee, sales representative, or agent of your company.

Your failure to complete and return this disclosure form may result in a delay of payment, the termination of your contract and/or suspension of your status as a responsive and responsible provider of goods or services to CMU.

Your obligation with regard to the disclosure of conflicts of interest is ongoing, therefore we ask that you promptly notify us should you become aware of any potential conflict following the submission of this form. At CMU discretion you may be asked to update this information periodically.

Vendor Name: _____
Contact Name: _____
Street Address: _____
Phone No.: _____
City, State, Zip: _____
Email: _____

Please select the appropriate statement:

____ I AM NOT aware of any relationship between the Vendor and a CMU employee which could result in potential personal gain for the CMU employee or which could enable the CMU employee to influence the vendor relationship for perceived personal gain.

____ I AM aware of a relationship (or potential relationship) between the Vendor and a CMU employee which could result in potential personal gain for the CMU employee or which could enable the CMU employee to influence the vendor relationship for perceived personal gain.

Employee Name: _____
Nature of Relationship: _____

By signing below, you represent and affirm that you have proper authority to act on behalf of the Vendor and that the foregoing statements are true and correct to the best of your knowledge.

Signature Date

Printed Name and Title

ATTACHMENT D

PROPOSAL CHECKLIST

Please note: Bidder's proposal will be considered incomplete unless the following are included. Indicate compliance by placing a check mark in the space provided: All Documents should be included **IN THE ORDER PROVIDED BELOW**. This form should be returned with the proposal as the last page.

- ☐ Attachment A: Proposal Compliance Form, completed and signed by Bidder's authorized representative.
- ☐ Responses to questions in Article II
- ☐ Responses to questions in Article IV
- ☐ Attachment B: Exceptions to Proposal
- ☐ Attachment C: Vendor Disclosure Form
- ☐ Attachment D: Proposal Checklist
- ☐ Attachment E: Functional and Technical Requirements List
- ☐ Attachment F: Pricing Spreadsheet (s)