Samford University

Office of Business Services

Purchasing Department

800 Lakeshore Drive

Birmingham, AL 35229

REQUEST FOR PROPOSAL

REQUEST FOR PROPOSAL

For

Advancement CRM Services

RESPONSE CERTIFICATION

I/we, the undersigned, having carefully examined the specifications and conditions of this proposal, and fully understanding the type and quality of the product(s) and/or service(s) required, hereby propose to supply the following product(s) and/or service(s) at the prices stated and certify that such prices include all costs of installation, transportation, packaging, delivery, storage, taxes, and service under warranty, F.O.B. destination to the designated university location.

Samford University requests bid proposal responses for Advancement CRM Services as per the attached specifications, proposal pages, and general bid conditions.

All questions concerning this bid proposal are to be directed to **Sydney Foshee,**
Phone 205-726-4589, e-mail sfoshee1@samford.edu

FIRM NAME ____________________ BY ____________________	
ADDRESS ____________________	SIGNATURE ______________
CITY ________________________ STATE ________	
ZIP ___________	TITLE ____________________
PHONE ________________________ FAX NUMBER ____________	
FEDERAL ID # ________________	DATE: __________________

SECTION 1 EXECUTIVE SUMMARY

A. Purpose

This Request for Proposal ("RFP") is being issued to establish one contract with one qualified offeror who will provide Advancement CRM Services at Samford University: "Samford", "University". As further described in this RFP. It is our intent to receive sealed proposals from qualified Bidders, demonstrating the capability to provide the quality of product and service required to meet the needs and objectives of the University.

Samford University seeks a comprehensive and integrated services program that will provide a quality program for the students, faculty, staff, and guests of the University.

B. About Samford University

For more than 170 years, Samford University and its students have impacted the world with their academic achievement and leadership skills. At the University's core is a foundation of Christian values and belief, a mission to nurture persons for God, for learning, forever that has withstood the test of time. Because of the united dedication to this mission, Samford students discover that professors, administrators, and staff encourage them to reach their highest potential intellectually, spiritually, and socially. The rewards are numerous, and the impact on individual lives is endless.

Samford University is a Christian community focused on student learning.

Samford was founded in 1841 by Alabama Baptists. In the present day, it maintains its ties to Alabama Baptists, extending and enhancing their original commitment by developing and maintaining in the campus community an exemplary Christian ethos and culture.

Samford University's corporate expression of faith commitment is The Statement of Baptist Faith and message of 1963, without amendment.

Samford offers bachelors, masters and professional doctoral degrees, as well as continuing education and various types of worthwhile, non-degree learning.

Samford serves students through eight organizational units: Howard College of Arts and Sciences, School of the Arts, Brock School of Business, Beeson School of Divinity, Orlean Bullard Beeson School of Education and Professional Studies, Cumberland School of Law, Ida V. Moffett School of Nursing, McWhorter School of Pharmacy, and the new College of Health Sciences.

C. Mission

The mission of Samford University is to nurture persons in the development of their intellect, creativity, faith, and personhood. As a Christian university, the community fosters academic, career, and ethical competency, while encouraging social and civic responsibility, and service to others.

D. Samford University Facts

Samford is consistently ranked in the top tier of its peer group by U.S. News and World Report, currently No. 3 in the South. Kiplinger's Personal Finance magazine ranks Samford No. 68 in the nation in its latest list of top 100 Best Values among private universities.

Enrollment now stands at 6,100

12:1 ratio of student enrollment to faculty; no students taught by graduate assistants

Samford offers 25 degree programs in approximately 110 majors

Samford intercollegiate athletics sponsors 17 sports in NCAA Division 1, nine for women and eight for men

There are 125 social, faith-based, service, performing, club sport, professional, and honorary organizations, as well as five national fraternities and eight national sororities.

Detailed information about Samford University is available at **http://www.samford.edu**.

E. Overview of the RFP Process

The objective of the RFP is to select one qualified Offeror to provide the goods and services outlined in this RFP to Samford University. This RFP process will be conducted to gather and evaluate responses from Offerors for potential award. All qualified Offerors are invited to participate by submitting responses, as further defined below.

All responders understand that the University maintains the exclusive right to make the selection of the Advancement CRM Services vendor, or no selection at all, with such decisions being in its sole and absolute discretion.

F. Financial Objectives

- The University intends to accept the proposal response that embraces the best interests of the University from a service, financial, and cultural viewpoint.
- The University will seek to attain maximum value at minimum cost.
- The Contractor will be responsible for and agrees to pay all costs associated with the successful performance of the Advancement CRM Services, except as noted elsewhere in this RFP or in the final Operating Contract. The Contractor shall be responsible for any and all net losses on operations, and shall not be reimbursed by the University for such losse

Schedule of Events

Description	Date	Time
Release of RFP	Monday, March 31, 2025	4:30 PM
Pre-Bid Meeting via Microsoft TEAMS	Thursday, April 24, 2025 Join the meeting now Meeting ID: 220 317 613 537 Passcode: 44zr6EL2	10:00 AM
Deadline for Written Response	Friday, May 9, 2025	4:30 PM
Invitation to Continue in the RFP Process and Schedule Demonstrations	Friday, May 30, 2025	4:30PM
Demonstrations to Samford Subject Matter Experts *	Monday, June 16 - Friday, June 27, 2025	
Demo Option 1	*Tuesday, June 10 and Wednesday, June 11*	*TBD*
Demo Option 2	*Tuesday, June 17 and Wednesday, June 18*	*TBD*
Demo Option 3	*Tuesday, June 24 and Wednesday, June 25*	*TBD*
Follow-Up Period based on Demos	Monday, June 30 - Friday July 18, 2025	
Committee Begins Evaluations	Monday, July 21 - Friday August 1, 2025	
Notice Given to Selected Vendor and Negotiations	August 2025	

* *Upon selection to provide demonstrations of the solution to Samford staff members, a list of requested sessions will be provided. Additionally, more demo options may be opened based on the number of vendors selected to move to the demo stage.*

Points of Contact

Charlotte Russ, Executive Director of Operations Advancement and Marketing, 205-726-4081, cruss@samford.edu

Sydney Foshee, Assistant Director of Advancement Technology Systems, 205-726-4589, sfoshee1@samford.edu

Contract Term

The Contract shall commence on or before July 1, 2026.

Submission of RFP

In order to be considered, six (6) copies (one original, one digital format, and five copies) of each proposal, under seal, must be delivered to: Sydney Foshee, 800 Lakeshore Drive, Birmingham, AL 35229 or emailsfoshee1@samford.edu.

Section IV. Scope of Work

I. ABOUT THE PROJECT

Samford University seeks to select and implement a next generation Advancement Customer Relationship Management (CRM) system to replace our use of Ellucian Banner Advancement. The intent for this new system is to serve as the system of record for information about our alumni, donors, and friends, while securely recording transactional data. This software should also support Samford University to raise more financial resources for the university, support us in future fundraising campaigns, and provide cost effective technology to lead the organization into the future. Additionally, it will serve as the foundation to support Samford's engagement, constituent management, gift processing, and reporting needs. The chosen software partner will aid Samford University Advancement in achieving the following goals:

1) Bringing unity of Advancement users into one, accessible system of record with nuanced security permissions to allow users to see the exact amount of information they need to operate effectively.
2) Embracing innovative technologies like artificial intelligence, executive dashboards, and other features that add efficiency to daily operations and fundraising efforts.
3) Decreasing the complexity of our current technology stack, including navigation between products for users, and well as reducing our reliance on Samford's Technology Services team for report and query writing, data appends, and dashboard creation.

Implementation is expected to be completed no later than February 2028.

II. UNIVERSITY ADVANCEMENT BACKGROUND

1) Organization Structure: Samford University Advancement is comprised of five teams: Advancement Services, Alumni and Philanthropic Engagement, Principal Gifts, Legacy League, Estate Planning and University Advancement Officers. Please see Appendix for Organization Chart.
    a) Advancement Services gathers, organizes, manages, and disseminates information to guide sound and effective fundraising efforts. Functions included in Advancement Services include data reporting and analytics, gifts and records, prospect development, and advancement technology systems. The advancement technology systems role was in part created to manage the nuance of our tech stack and prepare for a CRM conversion.
    b) Alumni and Philanthropic Engagement include the Alumni Association and its associated chapters and clubs as well as annual giving, stewardship, and donor engagement functions. The Samford Alumni Association encompasses all Samford graduates with membership coming at no additional cost to alumni. The Samford alumni staff engages alumni through a variety of different vehicles from events to mentorship programs.
    c) Principal Gifts is new to Samford beginning in 2023 with one principal gift officer who is also part of the Office of the President and solicits gifts of six figures and greater.

d) Legacy League is a membership-based organization which grants scholarships to students with significant financial needs. Members participate through donating and volunteering their time with the organization.

e) University Advancement Officers include frontline development officers, a planned gift officer, as well as officer managers who also have a portfolio of donors. These staff members are tasked with managing a portfolio and focusing on gifts of $25,000 and above. Each school within Samford has an associated development officer with some schools sharing development officers. This occurs specifically within the College of Health Sciences.

From a broader organizational perspective, advancement and marketing are unified under the leadership of Dr. Betsy Bugg Holoway, Vice President for Advancement and Marketing, in the Division of Advancement and Marketing. Additionally, University Advancement collaborates with many campus partners including the Office of the President, Finance, Business Affairs & Strategy, Student Affairs, and Enrollment Management.

2) Advancement Statistics
   a) Record Quantities as of February 2025
      i) Individual Constituents
         (1) Total:134,011
         (2) Living: 113,651
      ii) Organizations
         (1) Total: 6,271
      iii) Gifts
         (1) FY24 Total Gifts Processed: 10,192
         (2) FY24 Total Giving: $32,590,847.62
            (a) Estate Giving: $10,299,744.49
            (b) Non-Estate Giving: $22,291,103.13
      iv) Designations
         (1) Active: 2,888
         (2) Inactive: 376
   b) Advancement Staff Statistics
      i) 34 Staff Members (see Appendix A additional details)
      ii) 1 University Advancement Fellow (A student pursuing a graduate degree and working within University Advancement part-time)
      iii) 5+ Student Workers

3) Current Tech Stack:
   a) Database of Record – Ellucian Banner (Advancement)
   b) Reporting Tool - evisions Argos
   c) Prospect and Officer Management, Goal Setting – Blackbaud Fundraiser Performance Management
   d) Online Giving and Giving Day – GiveCampus
   e) Mass Email Marketing Tool – Emma by Marigold

f) Matching Gift Solution – Double the Donation
g) Stewardship Tools
    i) ThankView by Evertrue – Stewardship videos
    ii) ODDER by Evertrue – Digital Endowment Reporting
    iii) PledgeMine by Evertrue – Mail on demand for annual giving stewardship campaigns
h) Texting – Quiq
i) Planned Giving Tools
    i) Crescendo
j) Research Tools
    i) LexisNexis
    ii) iWave
    iii) Alumni Finder
    iv) Metasoft Systems/ Foundation Search
k) Event Management
    i) Eventbrite
l) Volunteer Management
    i) Sign-Up Genius
    ii) External Spreadsheets
m) Workflow Management and Ad Hoc Forms- SmartSheet
n) Office Productivity Suite – Microsoft 365
o) Corporate email – Outlook (Cloud hosted Exchange services by Microsoft)
p) Authentication environment – Microsoft ActMassive Directory
q) MFA - 2 factor integration – Duo

<u>In Sections III – XV, please provide a written response in PDF Format</u>

III. EXECUTIVE SUMMARY

a. Please begin your submission with a one-page executive summary covering the following:
    1. Brief company statistics including how many other private, religious higher education institutions are active clients.
    2. How many current customers of the solution have migrated from Ellucian's Banner Advancement?
    3. A non-technical description of the proposed solution and how it aligns with our scope of work.

IV. COVER LETTER

a. Please share a brief cover letter summarizing the solution qualifications, your desire to serve customers like Samford University in higher education, a brief biography for the primary contact for this proposal, and anything else you would like to share.

V. YOUR COMPANY

a. Identify the company name, address, city, state, zip code, and primary telephone number.
b. Identify who Samford should treat as our primary contact and their preferred contact information.

c. What is your company and where are you located?
d. When did the company start?
e. What markets do you serve?
f. How many employees do you have?
g. What makes your solution unique?
h. Describe your history serving higher education customers.
i. Please share two references that Samford could call upon that have transitioned from Ellucian Banner to your product.
j. Describe your security posture as an organization (security certifications e.g. SOC2, PCI compliance etc.)

VI. UNIVERSITY ADVANCEMENT REQUIRED AND DESIRED FEATURES

a. Biographic Records and Gift Processing Required Features

1. Describe how your solution facilitates gift processing and what the workflow of gift entry looks like.
    - Can gifts be batch processed?
    - Can a single gift be booked to multiple designations and/or multiple pledge payments?
    - Can biographic information be updated during gift entry for donors and organizations?
    - Can components of gift entry be automated?
    - Can defaults be set for certain fields during gift entry?
    - Is there nuance for the posting date as well as the legal credit date?
        a. Describe how the system might handle a situation where the legal credit date was in one calendar year and the posted date is in another calendar year.
    - Does your system alert a gift processor to any gifts from donors (or their connected entities) to verify if it is a pledge payment or not? If so, how does the solution identify the pledge?
    - Describe tribute gifts during gift processing (i.e. “in honor of”, “in memory of”)
    - Can the channel that the gift came via be recorded and reported on?
2. What types of gifts can your solution manage? Please provide a list.
3. Describe how soft crediting works in your solution. Can it memo credit more than one individual? For example, can both spouses be memo credited for a matching gift from one of their employers?
4. Describe how the solution manages gifts that include a premium.
5. When processing gifts that are in tribute of others, can the solution manage when multiple individuals are being honored and to different designations all in one gift?
    - Ex.) One gift of $100 given in honor of Mr. Sam Bulldog Jr. to the Samford Fund and in memory of Mr. Sam Bulldog Sr. To the Campus Recreation Fund.
6. Is there the ability to attach free text to gifts to make notes?
7. Is there the ability to add notes to constituent records that would provide an alert during processing? For example, details regarding incoming gifts, a need to post gifts to the

clearing account if guidelines are still in process, the designation of a forthcoming stock gift, etc.

8. How does the solution differentiate an anonymous donor from an anonymous gift?
9. Describe how the solution can accommodate fully anonymous gifts or donors, including remaining anonymous to the majority staff.
10. Does your solution provide somewhere to handle special handling notes to constituents or households? For example, specific directions for tax receipt for certain organizations.
11. Does your solution include an online giving platform? If so, how does that impact the gift processing function?
12. Our current online giving solution is GiveCampus. Describe how your solution integrates with GiveCampus and if gift uploads from GiveCampus can be automated.
13. Our new solution must feed gifts and pledges to the general ledger. Our finance team will remain on Ellucian Banner. Please describe how your solution can accomplish feeding gifts and pledges to the general ledger and how that process can be automated.
    - How does the solution interact with the institution's general ledger?
    - Can the solution perform reconciliation to the general ledger?
    - How does the solution handle adjustments to gifts & pledges when feeding to the general ledger?
    - How does the solution handle voiding transactions? Example scenarios include when transactions are posted on the wrong ID and need to move to the correct ID, when a check from a donor bounces, or when a pledge is canceled.
14. How does your solution manage third party payments including donor-advised funds, personal businesses, family foundations, etc.
15. Our current matching gifts partner is Double the Donation. Describe how your product integrates with Double the Donation. If it does not, then describe what solution or partnership you do support.
    - Does the solution offer ways to flag employers and employees of organizations who offer matching gifts as well as supply match details?
16. Describe how appeal/solicitation codes are administered in the solution and how they factor into gift processing. Where are they stored in the solution and in relation to the gift?
17. Can more than one solicitation code be applied to one gift?
18. Describe how recurring gifts are managed by your solution.
19. Describe how pledges are managed in your solution.
    - Can all edits to the pledge, whether it's being paid down by a third party or is being written off, be viewed on the pledge record?
    - Does the solution include a field to store the initial amount of the pledge for financial reporting purposes? Many times, pledges need adjustments due to third-party payments, but in yearly reporting to finance the original pledge amount must be maintained regardless of adjustments.
    - How does the solution handle pledges made to multiple designations?
    - Describe how the solution is used to establish a pledge schedule.

- What happens when pledge payments come off schedule?
- What happens when a pledge is overpaid? Underpaid?

20. How is pledge reconciliation facilitated by the solution?
21. Describe how your solution manages planned gifts from an entry and processing perspective.
22. Describe how the solution creates and maintains constituent biographic and demographic information, including names, formatted names, addresses, etc.
    - How many email addresses, mailing addresses, phone number, and names can each record store?
    - Please elaborate on addressee name fields. Are they formula-based or is each field free text?
    - Does the solution allow for the storage of multiple name formats for households and individuals? Formal and informal.
    - Is it possible to create new name fields for different uses for individuals and organizations?
    - Can different addresses, phone number, or email addresses be set as preferred for different purposes? For example, one email for alumni association communication and a different email address for advisory board participation.
    - Does the solution keep a historical record of contact information even once the contact method is inactivated. For example, former home addresses or email addresses.
23. Describe the process of creating a new constituent record. How many separate pages within the solution are accessed to accomplish establishing a new record?
24. How does the solution manage the creation of the ID number in the solution and the legacy ID number that would exist in Banner?
25. How many and what kinds of constituency types (i.e., “alumni”, “friend”, “parent”) are supported? Is there a limit?
26. Is the solution able to manage seasonal mailing addresses? Can date parameters be set or is this a manual process?
27. Describe how the solution manages communication and solicitation preferences, including inclusion and exclusion coding with dates and comments.
28. Describe how the solution manages decedent constituent records.
29. Is the solution able to store social media handles and links? If so, what platforms?
30. How does your solution approach householding?
    - Are household IDs created?
    - Are households a part of the prospecting function or do they function independently?
    - How do households impact reporting and querying?
    - Can addresses be set as preferred for the household as opposed to the individual
31. Describe how your solution manages relationships, family, business and beyond. Are relationship trees or maps available?

32. Describe how the solution approaches constituent employment information and what data can be recorded.
    - Does your solution have the ability to integrate with LinkedIn employment information? If so, how is it stored within the solution?
33. Describe how the solution can store constituent education information and what information can be recorded.
34. How does the solution manage duplicate records (person and non-person)? Is there capability to merge and purge based on user-specified criteria?
35. At Samford, we describe the moment that parents and recent graduates become constituents as “rolling”. When graduates and parents are rolled, their record belongs to University Advancement, and they officially become a constituent. If new parent records exist in Slate and new graduate records exist in Banner, describe how your solution would facilitate the creation of their records into your solution. How would duplicates be avoided?
36. Is National Change of Address (NCOA) processing included in the solution?
37. Describe how your solution handles, and can potentially automate, efforts to clean data via appends including NCOA, other outside vendors that supply biographical information, and large batches of data that come to advancement like Publishing Concepts information gathered while creating a directory.
38. How does your solution manage document storage? Describe how documents are uploaded and retrieved in your solution. Examples of documents include gift agreements, fund guidelines, obituaries, research profiles, correspondence, gift documentation, bank deposit slips, evidence of feed to finance and the general ledger and other pertinent donor and alumni information that may be utilized during internal and external audits.
    - Can documents be uploaded in mass quantities? If so, describe the process and how they are indexed to the correct place.

b. Biographic Records and Gift Processing Desired Features

1. As new gift types frequently emerge (i.e., cryptocurrency, services like Venmo and Cash App), how is your solution prepared to handle these new gift vehicles and allow us to report on them?
2. Does your solution provide a way for users outside of the Advancement Services team without editing access to submit updates to be reviewed by the records management team? How is that process facilitated? For example, if an officer receives an updated email address, is there a way that they can submit the email address to be updated that supplies it to the advancement services team to choose to confirm or to edit before adding to the CRM? An example Samford sees frequently is an accidental keystroke error that may lead to something like “ymail” instead of “gmail.” An additional scenario would be the record specialist’s responsibility to see if an old email address needs to be inactivated or perhaps used for another purpose.
3. Describe the layout of constituent records. Is all information about a donor accessible from one page?

4. Can donors be ascribed tags or other notifications that pop up when users are interacting with their record? For example, tags for current and former trustees, campaign chairs, etc.
5. Can tags in the previous question be used to generate queries if included in the solution?
6. Can photos be uploaded to donor records? Are they still stored on the donor record after they are updated?
7. Is there a way to integrate social media with records including photos and links?
8. Does your CRM have the native ability or an integration that can help seek obituaries and mark records as deceased?

c. Data Querying, Reporting, and Analytics Required Features

1. Describe the process of building a query in your solution.
2. Describe the process for building reports in your solution.
3. Does the solution provide a "no code" or "low code" ability to write reports and queries?
   - If not, what coding language is used to write reports and queries?
4. What file formats can reports and queries be exported in?
5. Describe how the report author, notes, which users have run the report, and other use data is stored in the solution.
6. Please provide a list of any "canned" or pre-constructed reports and queries that Samford could expect to receive out of the box with the solution.
7. Samford will have our most used reports queries pre-built in the solution before go-live.
   - Will that have an impact on implementation time?
   - Is that a part of your standard implementation?
   - Is there a limit to the number of reports your team can assist in building?
   - Our current enterprise reporting solution is evisions Argos. When we encounter new reporting needs or changes in report criteria or fields, Advancement Services submits a request to Technology Services who use SQL to build and/or edit the requested reports. University Advancement has over 300 argos reports that have been built in 10+ years that are generally utilized. What is your thought process around walking through those reports and what needs to be recreated in the solution?
8. How does your solution provide the opportunity for table joins to occur during the process of report writing?
9. Can reports be scheduled to be sent via email?
10. Can exports of dashboards be scheduled to be sent via email?
11. Describe how the solution handles soft credit and hard credit gifts in reports and queries.
12. Describe how your solution manages designations from establishment to receiving gifts. In your response additionally address:
    - How can the solution integrate with Banner in the use and creation of funds through your solution?
    - Can the solution display endowed fund balances, scholarship recipients, amount and date awarded, guidelines, agreements, amendments, etc.?
    - Can the solution create endowment reports and other impact reporting?

13. Describe the level of user access that can be given to end users. In your response additionally address:
    - Can our Data Reporting & Analytics team build reports to be run by others?
    - If templates can be created, describe how those could be accessed.
    - Can reports be built by Advancement Services in such a way that another staff member could run the report but select limited criteria through a pick list, checklists, or other similar means? Advancement services would control all other criteria and the final output fields. Example – stewardship mailing list that excludes those with mailing exclusions and anonymity that allows the end-user on staff to select their school or fund and pull the query at will, closest to the time of use.
        a. Can scheduled reports then be sent off this same "template"?
14. Describe the ability of your solution to create executive level dashboards. In your response additionally address:
    - Do dashboards offer the ability to "drill down" and click into the details shown? For example, links to donor records, lists creating data visualization elements, etc.
    - Can dashboards be exported to users without access to the solution?
    - Can dashboards display specific information based on the user that is logged in?
15. Do customers often utilize other analytics tools like Power BI and Tableau alongside your solution?
16. Does the solution support reporting standards such as CASE, VSE, or EAB?

d. Data Querying, Reporting, and Analytics Desired Features

1. Describe how the solution allows for the organization of a reporting library.
2. Can reports be run at the household and individual level?
3. Many professionals in advancement services understand how "Shadow Databases" or static spreadsheets come to exist within institutions and are used instead of the most recent data. What does your solution offer that helps provide more timely data to address the existence of these dated and static spreadsheets?
4. Do you have the functionality to be able to put a series of ID numbers back into a query to retrieve required fields? We currently have the capability to do this and frequently utilize it for static lists or to get additional data once the group is solidified. Example) a hand selected group of prospects from our prospect development team that we then need mailing addresses and other supporting information on. Advancement Services can paste ID numbers into a field and submit it to retrieve a CSV that encompasses all the fields needed for those ID numbers.
5. Does your solution support geographic mapping or "heat maps" on constituents and organizations?

e. Advancement Operations Required Features

1. Does your solution include an online giving page and associated transaction processing?
    - What payment methods does the solution support?
    - Does the solution provide real-time credit card processing?
    - Is the transaction processor PCI compliant?

- How does the solution handle canceled or refunded payments?
- Can the solution support recurring and scheduled payments?
- Can personalized links be created to specific funds? If so, can they be prepopulated with individual specific data? Describe the process of creating a link and personalized giving page if possible.
- Can the solution support crowdfunding campaigns including a Giving Day?
- Can donors establish a login to your giving page and their donation information? If so, explain the onboarding process.
- If you host the merchant services, please list any credit card fees associated with the online giving platform. Can they be donor-covered?

2. Samford generates a substantial number of gifts on a recurring basis through GiveCampus. Describe how we might retain those donors if we were to shift to your merchant services or giving platform.
3. Can the solution manage naming rights and named spaces?
4. Describe how the solution manages the lifecycle of a scholarship from fund establishment to how the solution would handle storing information about student recipients and award amount.
5. Describe the search functionality of your solution. For example, if a staff member needed information about a fund and to review guidelines, how would they find that information in your solution? Can the search function be used to find:
    - Individuals and organization records
        a. Can it search for past names of businesses and individuals?
    - Fund records
    - Reports and queries
    - Scanned documents
6. Describe the use of AI, existing and forthcoming, in your solution. Additionally:
    - How would you describe your organization's ethics and approach to the implementation of AI in your solution?
    - If AI is used in the solution, is customer data self-contained? Explain the use of Samford's data in the use of AI within your solution.
7. Describe the way users receive permissions and how broad or granular that access can be. Consider reports, queries, biographical information, dashboards, etc.
8. Describe the ability to create Samford-specific fields. For example, we desire to track religious affiliation in a field.
9. Is there a mobile friendly version of the solution? Is that a full mobile application or simply the ability to access it from a mobile browser?
10. Is the solution capable of designing a variety of workflows that prompt users to fill in information? This could apply to prospect management, fund development, or gift processing. Please describe the process of setting up workflows if applicable.
11. Does your solution have the ability for internal users to assign tasks to each other? If so, provide examples of these tasks.

12. Can an end user create a task list for themselves?
13. What kind of notifications and alerts can the solution send?

f. Advancement Operations Desired Features

1. Please share a copy of your upcoming product roadmap for this solution.
2. Can users customize their landing page? If so, explain the elements that can be present.
3. Can the solution assist in managing the workflow of creating guidelines? Please describe.

g. Prospect Development Required Features

1. Describe how a prospect researcher could work within your solution. What tools and features would they utilize?
2. Explain how a prospect researcher would put forth prospects for assignment within the solution. Currently, Samford has a stage before "Qualification" in our Moves Management flow where researchers can put forth "Research Recommnedations" to each school and unit.
3. How does the solution store wealth screening data and other valuable research data fields?
4. How many fields for wealth and research data are available? If they are limited, please list the field names.
5. Does the solution offer wealth screening or is/are there any existing partnership(s) for an integrated wealth screening partner?
6. Can you describe how the solution assists in pipeline development? What tools can be used to generate leads for principal, planned, major, and leadership annual gifts?

h. Prospect Development Desired Features

1. Can the solution generate a document that is the basis of a research profile provided to a development officer or university official?
2. If wealth screening is offered or is available through integration, is a real estate value indicator from Zillow or a similar real estate solution available?

i. Officer and Prospect Management Required Features

1. Describe how a development officer would manage their portfolio with the solution.
2. How does the solution create and maintain prospect information and manage the prospect process from identification through stewardship? Samford currently assigns a stage (Identification, Qualification, Cultivation, Solicitation, Stewardship, Permanent Stewardship, Disqualification), classification (major gift prospect, principal gift prospect, etc.) and rating (based on the development officer's feeling of likeliness to solicit in the next fiscal year using "Hot", "Warm", and "Cold"). How could your solution allow for the tracking of similar information supplied by the development officers or other cultivating parties?
3. Does the solution have a variety of assignment types? For example, primary gift officer, secondary gift officer, cultivator, principal gift officer, planned giving officer, etc.
4. Describe how the solution handles assignments in terms of multiple constituents and entities.
   - Can assignments be grouped as a household or other pertinent group? If so, what is the impact on moves management?

- How does the solution manage assignments to organizations?

5. What tools does the solution provide for proposal creation, tracking, and reporting? Describe the fields the solution provides in relation to proposals.
6. Describe how the solution tracks fundraiser performance. Samford currently uses Blackbaud's Fundraiser Performance Management to track number of visits, proposals submitted, dollars raised, etc. Describe how your solution offers dashboards, the ability to set goals both financial and behavior based (visits, qualifications, etc.), or other helpful features to the officer manager.
7. Describe how the function can assist in trip planning for frontline fundraisers.

j. Officer and Prospect Management Desired Features

1. When managing donor stages, can automations be created to send reminders or notifications to the assigned development officer based on time elapsed in stage?
2. Can the solution provide notifications to the assigned development officer if activity occurs (i.e. a gift, membership, event registration, or contact report) with one of their assigned prospects?
3. Does the solution offer a grant management tool for grants being received by the institution?
    - Can the solution track due dates for submission as well as reporting?
    - Please elaborate on the functions of the grant management tool if applicable.
4. Describe how your solution manages "credit" for gifts from a development officer goal-setting perspective. Can "credit" for a gift be split amongst officers who collaborated?

k. Alumni and Donor Engagement Required Features

1. Describe how your solution supports donor retention.
2. Describe how your solution supports donor stewardship.
3. Describe how the solution tracks contacts both at the individual and at the mass attendance level. Contact reports may also be known as call reports.
    - Can mass uploads be made for event participation or mail piece recipients? Which types of contact can be automated?
    - Can reports and queries be used to apply contacts to all on the list in the case of a mailing?
    - Can the solution integrate with Microsoft Outlook to record emails sent by Advancement staff members? If applicable describe what integration means to you in terms of an Outlook client.
    - Can the solution distinguish between "meaningful" contact (i.e., a visit, virtual visit, etc.) and mass communication efforts (i.e., emails, postcards, or texts)?
4. Can contact reports be entered by text message or voice from a mobile phone?
5. How does the solution support engagement and predictive giving likelihood scoring?
    - Are the formulas for these scores defined by Samford or does the solution provide a calculation? If the solution provides a calculation or template, please describe it.
    - If the scoring formula or algorithm is provided by the solution, is it proprietary?
6. What tools does your solution leverage to engage alumni, regardless of donor status?

7. Describe how the solution can track various constituent activities including undergrad participations like sports or Greek activities as well as alumni awards, class agents, and other unique activities that may not be membership based. Can these activities be start and end dated?
8. Can the solution automate the process of assigning activities to constituents within a specific criterion? For example, could all alumni in a specific radius of a zip code be included in an Alumni chapter and included in the activity as soon as they feel within the parameters? Could that activity include recorded start dates and end dates?

l. Alumni and Donor Engagement Desired Features

1. Describe how the solution tracks giving societies. Can it automate the process of assigning donors to various societies based on first gift, amount of total giving, years of giving, etc.?
2. Describe how tribute information is stored and how it can be extracted to create a tribute notification to the person being honored or a family member of a memorial tribute gift.

m. Membership Management Required Features

1. Does the solution offer a membership management tool? If so, please describe.
2. Can the membership management tool include membership organizations with varied levels of dues and donations at each level?
3. How are new memberships entered into the solution?
4. Are members able to sign up via a web form that can be built through the solution, or must an external tool be used to collect the membership data?
5. Are boards like trustees and other advisory boards managed as membership based or organizations or by another part of the solution?
6. Describe how membership levels and demographics can be reported on.

n. Membership Management Desired Features

1. Can the solution offer an online directory specific to members of an organization? Can that directory be exported for print?
2. Describe how the solution manages premiums and dues related to membership.

o. Volunteer Management Required Features

1. Does the solution offer a volunteer management tool? If so, please describe.
2. Can the solution track volunteer opportunities and allow volunteers to sign-up for volunteer events via a webpage?
3. Can the solution track volunteer hours? Can these be associated with each opportunity through online volunteer sign-up forms and then captured in the solution?
4. Can a volunteer manager be assigned to a constituent in addition to a development officer? Can multiple volunteer managers be assigned at one time?
5. Do volunteers access the environment? If so, provide more details as to what volunteers would need to access in the environment and walk us through how they authenticate.

p. Volunteer Management Desired Features

1. Can the solution offer an online directory specific to volunteers?

q. Campaign Management Required Features

1. Can the solution manage campaigns? If so, describe the types of campaigns the solution can manage.
2. Can the solution display campaign progress for internal management?
3. Explain how your feature may be used from campaign conception to campaign closing. What would Samford gain by using your unique solution?

r. **Campaign Management Desired Features**

1. Can gifts be associated with campaigns?
2. Can constituents be associated with campaigns?
3. Can named spaces be associated with campaigns?

s. Annual Giving Required Features

1. Describe how the solution accommodates creating segments of donors.
2. Can donors be segmented by hand and via automation in the solution? Explain where donor segments are housed in the solution.
3. Can households be segmented?
4. If your solution includes an email and online giving feature, is A-B testing possible?
5. If the solution includes an online giving feature, describe the metrics captured by the solution that can be reported on.
6. How does the solution support a Giving Day?
7. Describe the reports and dashboards that could be leveraged to analyze the results of an annual giving campaign.
8. Describe how your solution supports building an annual giving pipeline.

t. Annual Giving Desired Features

1. How does the solution support direct mail appeals?
2. Describe how the solution increases the retention of recurring donors.
3. Explain how the solution would support the daily work of annual giving director managing the customization of online giving pages, planning appeals throughout the year, and directing the annual university giving day.

u. Planned Giving Required Features

1. Describe how your solution supports planned giving.
2. How does the solution store and display planned gifts alongside other existing gifts and commitments?
3. Describe how the solution can assist in identifying ideal planned giving prospects.
4. Describe how estate gifts can be reported on. Can they be included and excluded in overall giving reports and if so how is that accomplished?

v. Communication Required Features

1. Samford currently uses EMMA by Marigold to send mass emails to specific segments. These segments are based on reports that run each night based on criteria like school of graduation and class year. Can your solution send these types of marketing emails for events and general communication to large groups?
2. Does your solution provide an opportunity for integration with Microsoft 365 – Outlook for mass emailing. If so, describe how.

3. How does segmenting email groups for user use function in the solution?
4. What metrics are captured in relation to email open rates and click throughs? How are they accessed and reported on?
5. Can the solution automatically send pledge reminders? Describe how the solution accomplishes generating those reminders.
6. If pledge reminders can be automated, can an assigned officer also be notified when the pledge reminder is sent?
7. Samford current sends out tax receipts through email and physical mail once per week for each gift received. Can the solution automatically generate tax receipts for each gift? If not, share how tax receipt is accomplished in the solution or with an additional product outside of the solution.
8. Can organizational branding be included in communications?
9. Does the solution provide nuanced opt-out and opt-in features that comply with the CAN-SPAM Act and CASL?
10. Can your solution integrate with Microsoft 365 hosted Outlook by sending emails from the solution on behalf of a Samford staff member?
    - Are those emails automatically entered as call or contact reports?
11. Can the solution send emails from a general email address? For example, giving@samford.edu or other group managed inboxes.

w. Communication Desired Features

1. Does the solution include a texting feature? If so, please describe.
2. Are texts sent through the solution saved as contact reports?
3. Can the solution facilitate video calls like Zoom or Microsoft Teams. Is it able to generate links to meeting rooms for constituents?
4. Can email campaigns be automated based on giving society or set criteria? For example, reminding donors of their giving anniversary, a campaign for first time donors that begins as soon as they make their first gift, etc.

x. Event Management Desired Features

1. Does the solution include an event management feature? If so, please describe how the solution would be used, from planning to follow-up, to managing an event.
2. How is event attendance tracked within the solution if the event is planned used the event management portion of the solution?
3. Describe how event attendance can be populated in constituent records.
4. Explain from the beginning stages of planning an event until its conclusion how your solution uniquely supports event management.
5. Can the solution create QR codes and other methods for attendees to check in at events?
6. Explain how the event management, communication tools, and reports might interact in your solution.

VII. UNIVERSITY ADVANCEMENT SCENARIOS

a. **Advancement Services Request Form:** The Samford University Advancement Services team currently utilizes a product called SmartSheet to build a dynamic form and associated ticket tracker for all advancement services requests (form available at https://www.samford.edu/departments/university-advancement/). In addition to capturing the requests of our advancement and marketing staff, SmartSheet also provides task and project management workflows around each request area. While SmartSheet has only been utilized by Advancement Services since October 2024, we have received over 700 requests of varying scope across the areas listed below. Our request areas include:

1. Biographical and Record Updates
   - Can either suggest updates to one individual at a time or a mass upload on an excel.
2. Gift and Pledge Information
   - Incoming gift notifications, stock gifts, requests on the appeal codes of gifts
3. Philanthropic Research Requests
   - Requests for profiles on prospects or contact information research.
4. Data & Reporting Requests
   - Requests for mailing lists, reports, historical information like guidelines or total gifts to fund.
5. New Fund Request, Guidelines, or Amendments
6. Grant Proposal Pre-Approval from University Advancement

Please share how your solution could help manage these requests or provide tools that may alleviate the need for some requests. Does your solution offer a workflow tool? Can it prompt those with an account and those without in the case of notifications and reminders?

Legacy League Memberships: The Legacy League is a membership-based organization that offers life-changing scholarships for students with financial need. They host annual special events including a Christmas Home Tour, a Scholarship Luncheon and a Scholarship Celebration. Membership is open to all community members. In addition to making scholarship donations, their members are also engaged in volunteer opportunities like delivering snacks, preparing birthday cards, and other supportive activities for students and members. The Legacy League has three primary needs from a new CRM solution: membership management, fund management, and volunteer management. Share how your solution could be used for these three functions on behalf of the Legacy League:

1. Membership Management: Does the solution manage membership at both a yearly dues level and a lifetime level? Can it track when upgrades occur between membership types? Share how your solution could accomplish managing Legacy League members. Membership levels and details:

Membership Type	**Membership Cost**	**Membership Duration**
Sustaining	$30	Annual member dues – must renew every year

Patron	$55	Annual member dues – must renew every year
Life	$300	One time dues payment and tax deductible – Lifetime membership
Challenge	$500	One time dues payment and tax deductible – Lifetime membership
Challenge Upgrade	$200	One time dues payment to move from "Life" membership to "Challenge"
Challenge Couple	$250	One time dues payment to ass spouse for existing "Challenge" level members

2. Fund Management: Legacy League staff members personally assist student recipients of Legacy League scholarships. Share how staff members could use the solution to both view giving to all Legacy League funds to support fundraising and view student recipient information.
3. Volunteer Management: Can the solution be used to present members with volunteer opportunities and track their hours spent volunteering as well as their attendance at volunteer meetings? Please describe the experience of setting up volunteer opportunities for staff and the experience for the end user signing up to volunteer.

b. **Reporting Scenarios**

1. Stewardship Functions: As the number of donors using donor-advised funds (DAFs) continues to increase nationally, Samford has also seen an increase in giving via DAFs. Please share how your solution can provide the right contact on queries for the right moment. For a DAF, the stewardship or personal contact would be the soft-credited donor while for financial purposes the DAF would still need to be the primary donor.
2. Current Parents and Their Children: Samford frequently reports on the activities of the parents of current students. Share how your solution could identify current parents who have a student enrolled at the University. How does your solution track when a current parent becomes a former parent?
3. Executive Level Dashboards: Describe what you believe the top three to five most valuable pieces of information your solution is uniquely capable of surfacing in an executive level dashboard. Sample dashboard visuals are encouraged.
4. For the purposes of reporting, please share how your solution could handle credit for an assigned gift officer and a solicitation code simultaneously from a goal tracking perspective. For example, a donor may be compelled to give to an annual giving campaign at the encouragement of a development officer. How is "double counting" prevented or safe-guarded for across the board in your solution?

c. **Samford Giving Day:** Samford Giving Day (SGD) is Samford University's annual one-day giving event. To see last year's online page please visit: https://www.givecampus.com/schools/SamfordUniversity/samford-giving-day-2024/?a=7702141 .

SGD features several special features. Please respond on how your solution could accomplish the following:

1. Dedicated pages for each project area or fund describing their mission and needs
2. Gift matches and challenges
   - Examples: “$1 for $1 donated to match the first $1,000 given by Sam Bulldog” or “$5,000 if 50 donors give in the next 3 hours.”
3. Competitions for student donors and donor advocates
   - Can the solution track advocates (those who share a link on their social media or via text/email and how many clicks that link generates)?
4. Donor walls and other data visualizations like maps, donor affiliation graphs, etc.
5. Solicitation and channel tracking for all gifts
6. Specialized stewardship thank you email with a video and specialized stewardship throughout the year

Please share any additional information you can around giving days and how they are administered and launched from your product.

VIII. TECHNICAL INFORMATION

a. General Technical Information

1. Is hosting for the solution provided by vendor (Saas) or by client? Please describe.
2. If SaaS, please provide information about your company's hosting environment including security, redundancy, data storage locations, system backups and disaster recovery plan.
3. Describe how load balancing and redundancy are utilized in your environment to ensure availability? Are they offered within a single data center only? Are they offered across data centers and geographical zones?
4. Do you support the uploading and storage of electronic documents? If yes, what security do you provide around this function? What are your record retention capabilities for electronic and image data?
5. Please describe the process for backing up the servers on which the service resides. Are backup copies made according to pre-defined schedules and security stored and protected?
6. If desired, can the institution extract a full back up? At what frequency?
7. Does your organization have a comprehensive Disaster Recovery Plan?
8. Is there a documented communication plan for impacted clients?
9. Do we have the opportunity to review your Disaster Recovery Plan(s) and supporting documentation?
10. If your solution is invited to show demonstrations to Samford, can you provide a contact to speak with our technology services team including Samford analysts and integration specialists?

b. Integration Details

1. General Integration Approach

- Supported Integration Methods
    a. Which methods of integration do you support (e.g., flat-file import/export, REST APIs, SOAP APIs, SFTP, scheduled batch processes, etc.)?
    b. Can data be both imported into your system and exported out of your system using these methods?
- Supported Data Formats
    a. Which data formats are supported for file-based integrations (e.g., CSV, XML, JSON, etc.)?
    b. Are there any constraints on file size or record count when exchanging data in batch files?
- Real-Time vs. Batch Integrations
    a. Does your product offer real-time integration capabilities (webhooks, event-driven APIs, etc.)?
    b. Are there scheduling options or tools provided for batch or scheduled integrations?

2. API Capabilities
    - API Standards and Protocols
        a. Does your API follow REST, SOAP, GraphQL, or another standard protocol?
        b. Do you support industry-standard authentication methods (OAuth 2.0, API keys, SAML, JWT, etc.)?
    - API Coverage
        a. Can all major functions and data within your CRM be accessed or manipulated via the API, or are there limitations?
        b. If there are limitations, please describe which data objects or functions are restricted from API access.
    - API Documentation & Developer Resources
        a. Do you provide comprehensive, up-to-date documentation for your API endpoints?
        b. What developer resources (e.g., sandboxes, developer portals, sample code, tutorials) are available?
        c. Do you provide an OpenAPI (Swagger) specification or interactive documentation that developers can use to explore, test, or generate client code for your APIs? If so, please describe how it is maintained and updated.
    - SDKs or Wrapper Libraries
        a. Do you offer client libraries or SDKs for specific programming languages (e.g., Python, Java, C#, JavaScript)?
        b. If yes, are they actively maintained, and where can they be accessed?
    - API Performance and Rate Limits
        a. Are there any rate limits or throttling policies on API usage?
        b. Can these limits be adjusted based on specific business needs?
        c. What is your average and peak response time for API calls?
    - API Versioning and Deprecation Policy
        a. How do you handle API versioning and backward compatibility?
        b. What is your policy and timeline for deprecating older API versions?

3. Security & Compliance
    - Security Standards
        a. How do you ensure data security during integration (encryption, secure transfer protocols, etc.)?
        b. Does your integration solution comply with data protection regulations (e.g., FERPA for student data, GDPR for EU data)?
    - Access Control
        a. Can integration endpoints be restricted by role-based access or IP whitelisting/blacklisting?
        b. How are credentials or API tokens managed, rotated, and revoked?
4. Data Handling
    - Error Handling & Retry Mechanisms
        a. How does your system handle errors in integrations (e.g., partial failures, malformed data)?
        b. Do you provide retry mechanisms, error logs, or notifications for integration failures?
    - Bulk Data Management
        a. Does your solution support bulk uploads/updates/deletions?
        b. What volume of records can be processed in a single batch operation without performance degradation?
5. Operational & Maintenance Considerations
    - Monitoring & Logging
        a. Is there a dashboard or logging mechanism to monitor integration jobs or API calls?
        b. Can errors, warnings, and informational logs be easily accessed for troubleshooting?
    - Ongoing Maintenance & Updates
        a. How frequently are system or API updates released?
        b. Do updates ever require downtime, and how are customers notified in advance?
    - Resource Requirements
        a. What technical skills or infrastructure are required on our side to implement and maintain integrations?
        b. Do you provide integration specialists or support services during and after implementation?
6. Roadmap & Vendor Support
    - Product Roadmap for Integrations
        a. What upcoming integration features or improvements are on your product roadmap?
        b. How do you prioritize integration-related enhancements or bug fixes?
    - Support & SLAs
        a. What support channels (email, phone, chat) are available for integration issues?

b. Do you offer any guaranteed response times (SLAs) for critical integration failures?

- Customer References & Case Studies
    a. Can you provide references or case studies from other higher education institutions that have integrated with Banner or similar ERP systems?
- Professional Services / Consulting
    a. Do you offer professional services or consulting to assist with initial integration setup and ongoing optimization?
    b. Is there a cost associated with these services, and how is it structured?

7. Banner-Specific Considerations
    - Existing Banner Integrations
        a. Do you have existing clients who have integrated your CRM with Ellucian Banner?
        b. Can you provide details on how that integration was achieved (methods, timelines, challenges, etc.)?
    - Pre-Built Connectors or Adapters
        a. Are there any out-of-the-box connectors or adapters specifically for Ellucian Banner?
        b. If yes, what data entities are covered, and are they actively maintained by your team?
    - Data Sync Frequency and Reliability
        a. If a pre-built connector exists, how often does it synchronize data (real-time, hourly, daily)?
        b. What mechanisms ensure data integrity between Banner and your CRM?

c. Security and Compliance Information

1. Provide the solution's HECVAT document.
2. Please describe your approach and/or practices related to application security, including details about your development process as well as controls implemented in production.
3. In the last 12 months, have you engaged an independent security firm to assess the security of your application? If so, please provide a copy of the assessment report.
4. In the last 12 months, have you engaged in an independent security firm to provide a SOC2 analysis, and if so, can you provide upon request?
5. Do you encrypt customer data in storage? If so, please explain what encryption techniques are employed and how encryption keys are managed. Include details about primary storage facilities as well as backups.
6. Do you encrypt entire customer databases or only specific elements stored within the database?
7. Do you employ network-based intrusion detection or prevention? If so, please explain.
8. Do you employ host-based intrusion detection or prevention? If so, please explain.
9. Do you employ any other controls to monitor for attacks? If so, please explain.
10. How secure is customer data when managed over a mobile device? What protocols are in place?

11. What is the data protection and retention policy our data will have at your facilities? Are records ever purged? If so, how often?
12. Does your solution adhere to standards used in higher education, including those used by AACRAO, NACUBO, FASB, etc.?
13. If you are selected to move forward and provide demos to Samford, can you provide a contact for our CSO to speak with to discuss your solution's security measures?
14. Describe your PCI compliance posture, level, and provide a PCI responsibility matrix if applicable. If compliance is with a third party you contract with, describe that relationship and respond to the same question.
15. Where are your data center located? If hosted, provide the name of the provider.
16. Is customer data stored on infrastructure outside of the United States? If so provide additional details.
17. What SSO (Single Sign-On) integrations do you support? (e.g. SAML 2.0)
    - Do you support Duo for Multifactor Authentication? If not do you have a roadmap to do so?

IX. IMPLEMENTATION AND TRAINING

a. Do you have a specific implementation team dedicated to higher education implementations?
b. What is the average time to successfully implement the solution? Can you provide a sample timeline?
c. Do you provide a dedicated project manager for the customer? Describe what typical involvement would look like for that individual.
d. Describe your implementation methodology. Provide a sample project plan.
e. What is the typical number of hours needed by the institution's IT department for implementation? From the institution's implementation team?
f. Describe your training methodology. Is there separate training for power users?
g. Do you provide the training, or do you contract a third party? What specifically is included in the solution's training plan.
h. What training materials are provided during the implementation? Are these materials accessible to employees after the implementation training is complete?
i. For initial implementation and training, please share if that occurs in-person or remotely.
j. Are there data cleaning functions that are easier achieved during implementation via the solution. For instance, should we resolve duplicates before we come into the solution or as a part of the data migration process?
k. After the initial training, as new employees are added, how will they be trained?
l. What kinds of training services and support are available after completion of implementation? How long will the support we experience during implementation be available after go-live?
m. Describe the support procedures during implementation (hours available, normal response time, remote diagnostic capabilities, etc.).
n. Describe the user communities available for your higher education clients.

o. Describe the conferences or other professional development offered to grow skills related to using the solution.
p. Describe the documentation available to users from a support perspective.
q. How necessary is an implementation partner to successfully implement your solution? What specific suggestions would you make regarding Samford? Do you have specific preferred partners?
r. How long are customers typically in the "stabilization" phase after go-live?
s. What is your approach to adding time into a project budget for unexpected situations?

X. SUPPORT AND UPDATES

a. Describe the levels of support options your company offers, and any additional cost associated with each level of support.
    1. What is the average response time at each level?
    2. During what hours is each level of support provided at?
b. Is support ever provided by third-party representatives? If so, under what circumstances?
c. Where are your support centers/professionals located?
d. Are all application updates and enhancements included as part of the standard annual subscription price?
e. Describe your system development lifecycle methodology including your environments, version control and change management.
f. How often do you provide system updates? How are updates deployed? What notification is provided to customers?
g. Are upgrades or system changes installed during off-peak hours or in a manner that does not impact the customer?
h. Are updates provided seamlessly without any intervention required from the customer?
i. Is a dedicated testing environment available on an ongoing basis?
j. Please provide your uptime percentages.
k. Does a typical contract include an SLA and if so, can you provide that in your response?

XI. COST AND LICENSING

a. Provide a detailed five-, seven-, and ten-year total cost breakdown, including all potential costs such as additional modules, user licenses, and third-party integrations.
b. What features and tools are included in the base package of the CRM solution, and what are the costs associated with adding additional functionality?
c. How do costs scale with adding new users or functionalities over time?
d. Describe the flexibility of your licensing model to accommodate fluctuating user numbers and different user roles.
e. Are there any anticipated future changes to the licensing model?
f. Please provide a list of percentages that represent the percentage increase customers most like Samford have received over the last five years in terms of yearly pricing.
g. Do you resell your product through third parties or sell directly to the customer?

h. Is it possible for us to have access to a sandbox account during the RFP review period to be able to interact with the solution?

XII. ACCESSIBILITY

a. Describe how the solution is ADA compliant.
b. If employing web-based technology, does your application conform with Level AA accessibility standards set forth in the WCAG 2.0?
c. If your application does not fully comply with the WCAG 2.0 Level AA standards, please describe areas of weakness within your application and what steps are being taken to remediate these weaknesses.
d. In the past 12-18 months, have you engaged an independent firm to evaluate the accessibility of your application? If so, please provide a copy of the audit report.

XIII. USER INTERFACE

a. How will users access the system? Do you provide a web interface? Which browsers are supported? Does your solution require other client software products?
b. Can your system take advantage of mobile and/or GPS-enabled mobile devices? Describe the capabilities. How is security ensured?
c. What are your capabilities for extending, configuring, or customizing the user interface?
d. Ease of navigation: Do you offer any mechanisms for user friendly navigation? E.g. Quick paths, Context Sensitive help, etc.
e. Do you provide online help to describe functionality, assist in locating a function or feature, or for descriptions of fields, contents, and acceptable formats?
f. Do you have dedicated user experience (UX) or user interface (UI) teams or contractors that conduct user research and assist in making the solution more user friendly?

XIV. NATIVE AND INTEGRATED SOLUTIONS TABLE

In the table below, please respond to if the feature or function requested can be accomplished:

- <u>Native to the solution</u> – out of the box functionality or must be built by the client using readily available tools within the solution.
- <u>Custom Modifications Required within the Solution</u> – Is possible but requires engagement with analysts working on behalf of the solution to create a unique outcome. Please provide an estimate of pricing to build the desired outcome.
- <u>Integration with 3rd Party</u> – not possible through the solution, but a partnership exists. Please provide an estimate of pricing.
- <u>Not Possible</u> – through your product and would need to be accomplished through other means.

Feature or Function	Native to Solution	Custom Modifications with Solution and Pricing	Integration with 3rd Party	Not Possible

Automated Communication Plans (Email and Text)				
Automated Pledge Reminders				
Automated Tax Receipts				
Customizable Giving Pages				
Dashboards with Data Visualizations				
Digital Endowment Reports				
Document storage with robust indexing				
Giving Statements (Calendar Year End Overview for Taxes)				
Guideline and Agreement Process Management				
Integrated Event Registration Pages and Communication Plans				
Portals (Volunteer, Alumni, Membership-Based Organizations, Donors)				
Print on Demand for Communication Pieces				
Report Scheduling for Automated Sends				
Robust Reporting Design				
Scholarship Management				

XV. FINAL THOUGHTS

a. Optionally, please share any additional details you would like to share with Samford in consideration of your solution.

XVI. APPENDIX

Appendix A: Org Chart for Samford Advancement