



# VCU Procurement Services

Date: April 04, 2022

Blackbaud, Inc.  
2000 Daniel Island Drive  
Charleston, SC 29492

RE: Contract #: 5799845JC  
Renewal No.: (8) Eight of (9) Nine

**Procurement Services**  
University Purchasing

912 W Grace Street, 5<sup>th</sup> Floor  
Box 980327  
Richmond, Virginia 23284

804 828-1077  
Fax: 804 828-7837  
TDD: 1-800-828-1120  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Dear Mr. Gregoire:

The current term for the Virginia Commonwealth University (VCU) Contract #5799845JC with Blackbaud for CRM software and services will expire on June 19, 2022. VCU intends to exercise the renewal in accordance with the Terms and Conditions of Contract # 5799845JC.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

- ☒ Pricing shall be determined by the parties upon execution of a new Blackbaud Order/Renewal Form.
- ☒ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, Box 843040, Richmond, VA.

Please return this document to me at your earliest convenience. Your response may be emailed to me at [lofgreenj@vcu.edu](mailto:lofgreenj@vcu.edu). If you have any questions, please contact me at (804) 628-2897.

Sincerely,  
Jason Lofgreen  
Senior Buyer, CUPO

Contract #: : 5799845JC

---

**RESPONSE:**

Blackbaud

---

Name of Firm



Signature

---

Kevin Gregoire

---

Name Printed

EVP, President US Markets

---

Title

05/31/2022

---

Date



# VCU Procurement Services

Date: June 04, 2021

Blackbaud, Inc.  
2000 Daniel Island Drive  
Charleston, SC 29492

**Procurement Services**  
University Purchasing

912 W Grace Street, 5<sup>th</sup> Floor  
Box 980327  
Richmond, Virginia 23284

804 828-1077  
Fax: 804 828-7837  
TDD: 1-800-828-1120  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

RE: Contract #: 5799845JC  
Renewal No.: (7) Seven of (9) Nine

Dear Mr. Gregoire:

The current term for the Virginia Commonwealth University (VCU) Contract #5799845JC with Blackbaud for CRM software and services will expire on June 19, 2021. VCU intends to exercise the renewal in accordance with the Terms and Conditions of Contract # 5799845JC.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

- \_\_\_\_\_ Pricing remains the same as the previous contract period.
- \_\_\_\_\_ Attached is the revised pricing in accordance with the contract terms.
- \_\_\_\_\_ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, Box 843040, Richmond, VA.

Please return this document to me at your earliest convenience. Your response may be emailed to me at [lofgreenj@vcu.edu](mailto:lofgreenj@vcu.edu). If you have any questions, please contact me at (804) 628-2897.

Sincerely,  
Jason Lofgreen  
Senior Buyer, CUPO

Contract #: : 5799845JC

---

**RESPONSE:**

Blackbaud

Name of Firm



Signature

Kevin Gregoire

Name Printed

President, ECBU

Title

06/17/2021

Date





**VCU**

Procurement Services

THIRD AMENDMENT TO  
CONTRACT NO. 5799845JC  
BY AND BETWEEN  
VIRGINIA COMMONWEALTH UNIVERSITY  
AND  
BLACKBAUD, INC.

This Third Amendment to Contract No. 5799845JC by and between Virginia Commonwealth University, hereinafter referred to as "VCU", and Blackbaud, Inc., hereinafter referred to as "Contractor", is entered into as of the date the last signature is affixed below.

WHEREAS, VCU and the Contractor entered into Contract 5799845JC, dated the eighteenth day of June, 2014 ("the Contract"); and

WHEREAS, VCU desires to continue to obtain the goods and services that Contractor offers as revised herein; and

WHEREAS, Contractor agrees to continue to provide the goods and services to VCU as revised herein; and

WHEREAS, the Contract provides for changes to the terms of the Contract through a change provision set forth in Section IX., General Terms and Conditions, Article O.

NOW THEREFORE, VCU and Contractor agree to enter into this Amendment to allow the following changes and additions to the Contract:

1. The terms contained in the VCU Data and Intellectual Property Protection Addendum are attached hereto and incorporated herein.
2. All other terms and conditions of the Contract shall remain in full force and effect.

This Amendment No. 3 shall become effective upon execution by VCU and Contractor.

IN WITNESS WHEREOF, the parties have caused this Amendment to be duly executed, intending thereby to be legally bound.

(signature page follows)

CONTRACTOR:  
**Blackbaud, Inc.**

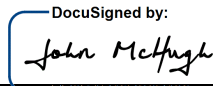
By: 

Name Printed: Kevin Gregoire

Title: President, Enterprise Business Unit

Date: 2/1/2021

PURCHASING AGENCY:  
**Virginia Commonwealth University**

By:   
EE6DA7427C67468...

Name Printed: John McHugh

Title: Director, Procurement Services

Date: 2/4/2021

## Data and Intellectual Property Protection Addendum

### 1. Definitions

Capitalized terms used but not defined have the meaning given in the Agreement.

- a. "Contractor" means Blackbaud, Inc.
- b. "End User" means the individuals authorized by the University to access and use the Services provided by Contractor under this Agreement.
- c. "Personally Identifiable Information" includes but is not limited to the following: personal identifiers such as name, address, phone number, date of birth, Social Security number, and student or personnel identification number; "personal information" as defined in Virginia Code section 18.2-186.6 and any successor laws of the Commonwealth of Virginia; personally identifiable information contained in student education records as that term is defined in the Family Educational Rights and Privacy Act, 20 USC 1232g; "medical information" as defined in Virginia Code Section 32.1-127.1:05; "protected health information" as that term is defined in the Health Insurance Portability and Accountability Act, 45 CFR Part 160.103; nonpublic personal information as that term is defined in the Gramm-Leach-Bliley Financial Modernization Act of 1999, 15 USC 6809; credit and debit card numbers and access codes and other cardholder data and sensitive authentication data as those terms are defined in the Payment Card Industry Data Security Standards; other financial account numbers, access codes, driver's license numbers; and state- or federal-identification numbers such as passport, visa or state identity card numbers.
- d. "Securely Destroy" means taking actions that render data written on physical (e.g., hardcopy, microfiche, etc.) or electronic media unrecoverable by both ordinary and extraordinary means. These actions must meet or exceed those sections of the National Institute of Standards and Technology (NIST) SP 800-88 guidelines relevant to data categorized as high security.
- e. "Security Breach" means a security-relevant event in which the security of a system or procedure used to create, obtain, transmit, maintain, use, process, store or dispose of data is breached, and in which University Data is exposed to unauthorized disclosure, access, alteration, or use.
- f. "Services" means any services provided by Contractor to the University other than Subscriptions that are pursuant to a Blackbaud Order Form (and statement of work ("SOW") if applicable) and may include professional, consulting, or training services. .
- g. "University Data" includes all Personally Identifiable Information and other information that is not intentionally made generally available by the University on public websites or publications, including but not limited to business, administrative and financial data, intellectual property, and patient, student and personnel data.

### 2. Data Privacy

- a. Contractor will use University Data only for the purpose of fulfilling its duties under this Agreement and will not share or disclose such data to any third party without the prior written consent of the University, except as required by this Agreement or as otherwise required by law.
- b. University Data will not be stored outside the United States without prior written consent from

the University.

- c. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill Contractor obligations under this Agreement. Contractor will ensure that employees who perform work under this Agreement have received appropriate instruction and understand how to comply with the data protection provisions of this Agreement.
- d. The following provision applies only if Contractor will have access to the University's education records as defined under the Family Educational Rights and Privacy Act (FERPA): Contractor acknowledges that for the purposes of this Agreement it will be designated as a "school official" with "legitimate educational interests" in University education records, as those terms have been defined under FERPA and its implementing regulations, and Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use the education records only for the purpose of fulfilling its duties under this Agreement for University's and its End User's benefit, and will not share such data with or disclose it to

any third party except as provided for in this Agreement, required by law, or authorized in writing by the University.

3. Data Security

- a. Contractor will store and process University Data in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved. Without limiting the foregoing, Contractor warrants that all electronic University Data will be encrypted in transmission (including via web interface) in accordance with industry best practices commensurate to the sensitivity of the information such as controls outlined in the Moderate or High control baselines in the latest version of National Institute of Standards and Technology Special Publication 800-53.
- b. If Contractor stores Personally Identifiable Information as part of this Agreement, Contractor warrants that the information will be stored in accordance with industry best practices commensurate to the sensitivity of the information such as controls outlined in the Moderate or High control baselines in the latest version of National Institute of Standards and Technology Special Publication 800-53.
- c. Contractor will use industry-standard and up-to-date security tools and technologies such as anti-virus protections and intrusion detection methods in providing Services under this Agreement.

4. Employee Background Checks and Qualifications

Contractor shall ensure that its employees who may have access to University Data have passed a criminal background check pursuant to the Code of Virginia, §2.2-1201.1. Specifically, Contractor shall ensure an investigation is conducted by a third-party vendor utilizing courthouse records and national databases to obtain records within the past seven (7) years.

Convictions related to drugs, violence, and sexual behavior are generally considered job related due to the nature of the VCU environment and the need to provide reasonable levels of protection for students, patients, employees, visitors and institutional resources. Individuals with failed background checks shall not participate in the performance of this Agreement and must undergo additional evaluation before access to information is provided. Contractor shall maintain records sufficient to document the completion of required criminal background checks.

5. Data Authenticity and Integrity

Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor will be responsible during

the terms of this Agreement, unless otherwise specified elsewhere in this Agreement, for converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration.

6. Security Breach

- a. Response. Upon becoming aware of a Security Breach, Contractor will notify the University of a Security Breach within seventy-two (72) hours of Blackbaud's discovery of such breach, fully investigate the incident, and provide reasonable assistance with the University's investigation of and response to the incident. Except as otherwise required by law, Contractor will neither provide notice of the incident directly to individuals whose Personally Identifiable Information was involved, nor will the Contractor provide notice to regulatory agencies or other entities, with the exception of notification to entities with the need-to-know in the course of the investigation of the breach, without prior written permission from the University.
- b. Liability. The contractor shall indemnify and defend the University against any third-party claims arising from the contractor's (i) breach of its confidentiality obligations pursuant to this Section 6, including the direct, reasonable costs of any legally mandated notification or mitigation and civil penalties imposed on the indemnified party as a result of the indemnifying party's breach of its confidentiality obligations.

7. Response to Legal Orders, Demands or Requests for Data

- a. Except as otherwise expressly prohibited by law, Contractor will
  - i. as soon as reasonably possible notify the University of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data;
  - ii. consult with the University regarding its response;
  - iii. cooperate with the University's reasonable requests in connection with efforts by the University to intervene and quash or modify the legal order, demand or request; and
  - iv. provide the University with a copy of its response upon the University's request.
- b. If the University receives a subpoena, warrant, or other legal order, demand (including request pursuant to the Virginia Freedom of Information Act) or request seeking University Data maintained by Contractor, the University will promptly provide a copy to Contractor. Contractor will promptly supply the University with copies of data required for the University to respond and will cooperate with the University's reasonable requests in connection with its response.

8. Data Transfer Upon Termination or Expiration

- a. Upon termination or expiration of this Agreement, Contractor will ensure that all University Data are securely returned or destroyed as directed by the University in its sole discretion.

Transfer of University Data to the University or a third party designated by the University shall occur within a reasonable period of time and without significant interruption in service. Contractor shall, to the extent technologically feasible, provide University with a copy of its Data in its then-standard and commercially accessible database format and ensure, the University will have reasonable access to University Data during the transition. In the event the University requests destruction of its data, Contractor agrees to Securely Destroy all data in its possession and in the possession of any subcontractors or agents to which Contractor might have transferred University Data. Contractor agrees to provide documentation of data destruction to the University upon written request.

9. Audits

- a. Contractor shall provide copies of its third-party audit reports (PCI and SOC) to the University upon request, once annually. This provision applies to all agreements under which Contractor must create, obtain, transmit, use, maintain, process, or dispose of University Data.
- b. If Contractor must under this Agreement create, obtain, transmit, use, maintain, process, or dispose of the subset of University Data known as Personally Identifiable Information or financial or business data which has been identified to Contractor as having the potential to affect the accuracy of the University's financial statements, Contractor will at its expense conduct or have conducted at least annually a(n):
  - i. American Institute of CPAs Service Organization Controls (SOC 2) Type II audit, or other security audit with audit objectives, which attests Contractor's security policies, procedures and controls;
  - ii. vulnerability scan of Contractor's electronic systems and facilities that are used in any way to deliver electronic services under this Agreement; and
  - iii. formal penetration test of Contractor's electronic systems and facilities that are used in any way to deliver electronic services under this Agreement.

Additionally, upon University request, Contractor will provide the copies of the above SOC 2 audit, and will promptly modify its security measures as needed based on those results in order to meet its obligations under this Agreement.

10. Compliance

- a. Contractor will comply with all applicable laws and industry standards in performing services under this Agreement. Any Contractor personnel visiting the University's facilities will comply with all applicable University policies regarding access to, use of, and conduct within such facilities. The University will provide copies of such policies to Contractor upon request.
- b. Contractor warrants that the service it will provide to the University is fully compliant with relevant laws, regulations, and guidance that may be applicable to the service, such as: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Payment Card Industry Data Security Standards (PCI-DSS).
- c. If the Payment Card Industry Data Security Standards (PCI-DSS) are applicable to Contractor service provided to the University, Contractor will, upon written request, furnish proof of compliance with PCI-DSS within 10 business days of the request.
- d. Section 508 Compliance: The University requires all information technology to comply with Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended. VCU acknowledges that Contractor's customer relationship management software tools are not completely compliant with Section 508. Contractor shall provide annually an action plan for Section 508 compliance if requested by University.



11. No End User agreements

This Agreement is the entire Agreement between the University (including University employees and other End Users) and Contractor. In the event Contractor enters into terms of use agreements or other agreements or understandings, whether electronic, click-through, verbal or in writing, with University employees or other End Users, such agreements shall be superseded by the terms and conditions of Contract # 5799845JC.

12. Contractor Account Security

If Contractor is a registered vendor in eVA or RealSource, Contractor is responsible for the security of its portal account, including restricting access to it, maintaining the confidentiality of login information, and taking any other actions necessary to protect the security of the Contractor's account. University will not be responsible for a third party's fraudulent collection of University payments due to the Contractor's failure to update or protect its account information.

13. Survival

Contractor's obligations under Section 10 shall survive termination of this Agreement until all University Data has been returned or securely destroyed.



# VCU Procurement Services

Date: June 18, 2020

Blackbaud, Inc.  
2000 Daniel Island Drive  
Charleston, SC 29492

RE: Contract #: 5799845JC  
Current Purchase Order: P0010890

**Procurement Services**  
University Purchasing

912 W Grace Street, 5<sup>th</sup> Floor  
Box 980327  
Richmond, Virginia 23284

804 828-1077  
Fax: 804 828-7837  
TDD: 1-800-828-1120  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Dear Ms. Davis:

The current term for the Virginia Commonwealth University (VCU) Contract #5799845JC with Blackbaud for CRM software and services will expire on June 19, 2020. VCU intends to exercise the renewal in accordance with the Terms and Conditions of Contract # 5799845JC.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

- \_\_\_\_\_ Pricing is in accordance with Renewal Invoice 91883369
- \_\_\_\_\_ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages
- \_\_\_\_\_ required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, Box 843040, Richmond, VA.

Please return this document to me at your earliest convenience. Your response may be emailed to me at [lofgreenj@vcu.edu](mailto:lofgreenj@vcu.edu). If you have any questions, please contact me at (804) 628-2897.

Sincerely,  
Jason Lofgreen  
Senior Buyer, CUPO

Contract #: : 5799845JC

---

**RESPONSE:**

Blackbaud

---

Name of Firm



---

Signature

Kevin Gregoire

---

Name Printed

President, EMG

---

Title

6/30/2020

---

Date



# VCU Procurement Services

Date: June 18, 2019

Blackbaud, Inc.  
2000 Daniel Island Drive  
Charleston, SC 29492

RE: Contract #: 5799845JC  
Current Purchase Order: EP2805673

**Procurement Services**  
University Purchasing

912 W Grace Street, 5<sup>th</sup> Floor  
Box 980327  
Richmond, Virginia 23284

804 828-1077  
Fax: 804 828-7837  
TDD: 1-800-828-1120  
[www.vcu.edu/procurement](http://www.vcu.edu/procurement)

Dear Ms. Davis:

VCU intends to exercise the renewal as outlined on Renewal Form Q-00727579 and in accordance with the Terms and Conditions of Contract # 5799845JC.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

- \_\_\_\_\_ Pricing is in accordance with Order Form Q-00750406 and Renewal Form Q-00727579
- \_\_\_\_\_ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance
- \_\_\_\_\_ coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, Box 843040, Richmond, VA.

Please return this document to me no later than June 20, 2019. Your response may be emailed to me at [lofgreenj@vcu.edu](mailto:lofgreenj@vcu.edu). If you have any questions, please contact me at (804) 628-2897.

Sincerely,  
Jason Lofgreen  
Senior Buyer

Contract #: : 5799845JC

---

**RESPONSE:**

Blackbaud, Inc.

---

Name of Firm



Signature

---

Kevin Gregoire

---

Name Printed

President, EMG

---

Title

6/21/2019

---

Date



# VCU

## Procurement Services

SECOND AMENDMENT TO CONTRACT NO. 5799845JC \_\_\_\_\_  
BY AND BETWEEN  
VIRGINIA COMMONWEALTH UNIVERSITY  
AND  
BLACKBAUD, INC.

This second Amendment to Contract No. 5799845JC by and between Virginia Commonwealth University, hereafter referred to as "VCU", and Blackbaud, Inc., hereinafter referred to as "Blackbaud", is entered into as of the 1st day of September 2018.

WHEREAS, VCU and Blackbaud entered into Contract No. 5799845JC, dated June 18, 2014 ("the Contract");

WHEREAS, VCU desires to continue to obtain the goods and services that Blackbaud offers as revised herein;

WHEREAS, Blackbaud agrees to continue to provide the goods and services to VCU as revised herein;

WHEREAS, the Contract provides for changes to the terms of the Contract through a changes provision set forth at Section O: Changes to the Contract; and

WHEREAS, VCU and Blackbaud desire to revise the Contract in accordance with Section O,

NOW THEREFORE, VCU and Blackbaud agree to enter into this Amendment to allow the following changes and additions to the Contract:

1. VCU and the other designated Members of VHEPC (Virginia Higher Education Procurement Consortium) as designated in Attachment A shall be considered a "Consortium" and shall be entitled to purchase Blackbaud Solutions at the rates and discounts set forth in Attachment B, at each Member's discretion, provided each individual Member successfully completes Blackbaud's regulatory new customer screening review prior to executing an Order Form.
2. Designated Members shall be as stated in Attachment A attached herein.
3. Purchases by VCU, and/or a Member of the Consortium, from Blackbaud, shall be executed on a standard Blackbaud Order Form. Each purchase will be exclusively governed by the terms and conditions of the Contract.
4. Each Member shall execute Order Forms under its own legal entity, and for the purposes of such Order Forms shall be referred to as "Client" or "You."
5. VCU represents and warrants that it is the lead institution for the Members for purposes of the Contract and has the authority to bind the Members to this Letter Agreement.

This Amendment shall become effective upon execution of this Amendment by VCU and Blackbaud. All other terms and conditions of the Contract shall remain in full force and effect.

IN WITNESS WHEREOF, the parties have caused this Amendment to be duly executed, intending thereby to be legally bound.

VIRGINIA COMMONWEALTH  
UNIVERSITY

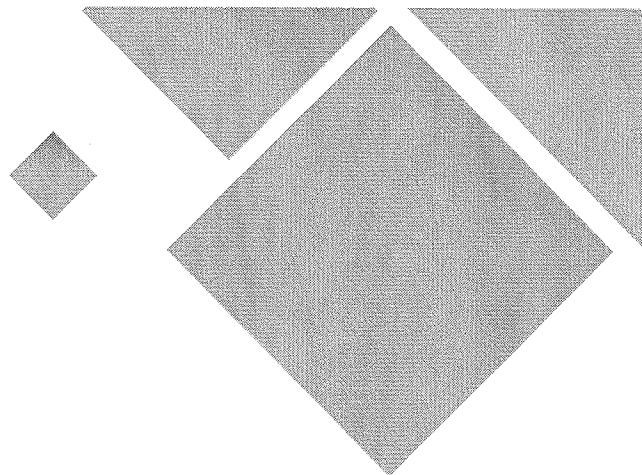
By: 

Mark Roberts  
Interim Director  
Procurement Services  
Date: 9/7/18

Blackbaud, Inc.

By: 

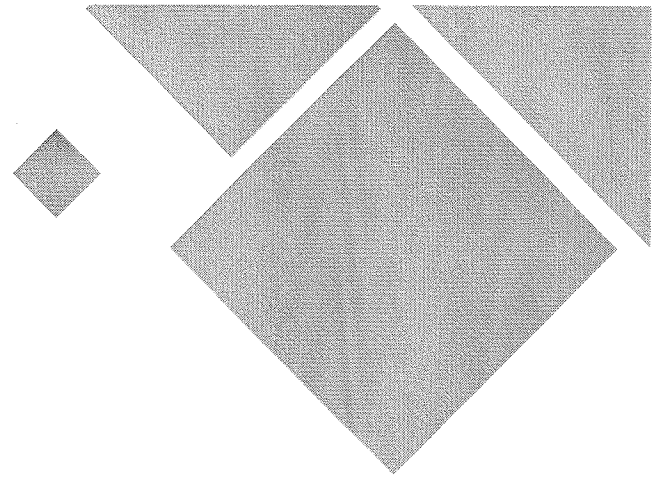
Name Printed: Kevin Gregoire  
Title: \_\_\_\_\_  
President, Enterprise Business Unit  
Date: \_\_\_\_\_ 09/11/2018



## Attachment A: Consortium Member List

George Mason University	Christopher Newport University
James Madison University	
Old Dominion University	
Radford University	
University of Virginia	
Virginia Commonwealth	
Virginia Military Institute	
Virginia Tech	
William & Mary	
Longwood University	
University of Mary Washington	





## Attachment B: Consortium Solutions Discount Sheet

(new purchases only and does not apply to past purchases)

Products and Solutions	Consortium Member Discount	Hourly Services Rate
Raiser's Edge NXT	15%	\$190.00
Blackbaud CRM	15%	\$190.00
Financial Edge NXT	15%	\$190.00
AcademicWorks	15%	\$190.00



► power your passion

2000 Daniel Island Drive, Charleston SC 29492-7541

# Renewal Form

Site ID: 59760  
Order Number: Q-00544991

**Bill to:**  
John Seo  
Virginia Commonwealth University  
111 N. 4th St PO Box 842026  
Richmond, VA 23219

**Sold to:**  
Blake MacIver  
Virginia Commonwealth University  
111 N. 4th St PO Box 842026  
Richmond, VA 23219

**Valid Until:** 6/2/2018  
**Effective Date:** 6/20/2018  
**Currency:** USD  
**Payment Terms:** NT30

## Software

**BBIS** \$0.00

*Billed: Up Front - Immediate*  
*Contract term: 1 month Start Date: 6/20/2018 End Date: 6/19/2019*

**BBCRM** \$0.00

*Billed: Up Front - Immediate*  
*Contract term: 1 month Start Date: 6/20/2018 End Date: 6/19/2019*

**DM and BBCRM** \$0.00

*Billed: Up Front - Immediate*  
*Contract term: 1 month Start Date: 6/20/2018 End Date: 6/19/2019*

## Subscriptions

**Microsoft Bing Maps** Year 1: \$131.13 ✓

*Billed: Annual*  
*Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019*

**BBCRM Hosting** Year 1: \$77,475.78 ✓

*Billed: Annual*  
*Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019*

**BBCRM Infinity Software Dev Kit Support** Year 1: \$14,322.15 ✓

*Billed: Annual*  
*Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019*

**BBECRM Technical Account Manager**

Year 1: \$0.00

Billed: Annual

Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019

**Maintenance****BBIS Maintenance**

Year 1: \$0.00

Billed: Annual

Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019

**CRM Maintenance**

Year 1: \$174,530.36 ✓

Billed: Annual

Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019

**CRM and Direct Marketing Maintenance**

Year 1: \$0.00

Billed: Annual

Contract term: 12 months Start Date: 6/20/2018 End Date: 6/19/2019

**Renewal Order Totals: \$266,459.42****General Terms**

Enter text here to overwrite the above PO Number or add a note to the invoice: {{add\_es\_\_signer1:string(maxlen=35)}}

The fees and terms on this Order Form are valid until 6/2/2018. This Order Form is governed by the Blackbaud Solutions Agreement effective 6/18/2014 and applicable terms and conditions in the Online Terms and Conditions Center, and by signing this Order Form You agree to these terms.

attached hereto.

Reference to Advantage level maintenance is replaced with the Scope of Customer Support, available at [https://www.blackbaud.com/files/BB\\_Scope\\_Customer\\_Support.pdf](https://www.blackbaud.com/files/BB_Scope_Customer_Support.pdf). Any previous language associate to a Technical Account Manager shall be struck in its entirety. Current maintenance fees for this term includes a Technical Account Manager (TAM), however, all future renewals and terms will require a separate TAM subscription to continue TAM services.

Our records indicate that You are Tax Exempt. You will not be charged sales tax on Your orders as long as Your exemption certificate has not expired. If it has expired, send the new certificate to: [SalesTaxExemptCertificates2@blackbaud.com](mailto:SalesTaxExemptCertificates2@blackbaud.com).

You acknowledge that the Software licensed in this Order Form will be provided through electronic download and that no additional shipment of the program on tangible media (i.e., CD, disk, tape, etc.) shall be provided or is required.

You acknowledge that certain aspects of Our Solutions interface with and share client content with partner applications purchased by You from third parties ("Partner Applications"). We make no warranty with respect to any Partner Applications, and We shall have no liability should client content become unavailable from such Partner Applications for any reason. Your use and remedies with respect to such Partner Applications shall be pursuant to the applicable third-party agreements in place between You and the third-party provider of the Partner Application.

Signatures

IN WITNESS WHEREOF, the parties have caused this Order Form to be executed by their duly authorized representatives.

AGREED:

  
Client: Virginia Commonwealth University

Blackbaud, Inc.

By: {{\_es\_.signer:signature}}

Name: {{\_es\_.signer:fullname}}

Karol Kain Gray

Title: {{\_es\_.signer:title}}

Senior VP & CFO

Date: {{\_es\_.signer:date}}

(\*Effective Date) 06/20/2018



Name: Brian E Boruff

Title: President, Enterprise Business  
Unit

Date: 05/15/2018

*All proposed modifications, variations, edits, or additions to this Order Form are objected to and deemed material unless otherwise mutually agreed to in writing.*



# Procurement Services

## FIRST AMENDMENT TO CONTRACT DATED JUNE 18, 2014

BY AND BETWEEN

VIRGINIA COMMONWEALTH UNIVERSITY

AND

BLACKBAUD, INC.

This First Amendment to the agreement between Virginia Commonwealth University, (hereinafter referred to as "VCU"), and Blackbaud, Inc., (hereinafter "Blackbaud"), is entered into as of the 19<sup>th</sup> of June, 2018.

**WHEREAS**, Blackbaud and VCU have previously entered into Contract #5799845JC dated June 18, 2014, pursuant to which Blackbaud provides alumni relationship management tools (the Original Agreement);

**WHEREAS**, VCU desires to renew certain software subscriptions and maintenance agreements for the period June 20, 2018 through June 19, 2019;

**WHEREAS**, Blackbaud desires to supplement the Original Agreement with certain Customer Support terms;

**WHEREAS**, Blackbaud is willing to extend the Original Agreement as provided herein;

**WHEREAS**, VCU is willing to accept supplemental Customer Support terms; and

**WHEREAS**, the Special Terms and Conditions, Paragraph M. of the Original Agreement allows for such modifications.

**NOW, THEREFORE**, in consideration of the terms, covenants, and conditions herein contained, the parties agree as follows:

1. The Subscriptions identified on Renewal Forms Q-00544991 and Q-00550620, attached and incorporated herein, are hereby extended and shall now expire on June 19, 2019.
2. The CRM Maintenance identified on Renewal Form Q-00544991 is hereby extended and shall now expire on June 19, 2019.
3. The terms contained in the Blackbaud Scope of Customer Support dated March, 2018, and attached hereto, are incorporated herein.
4. Renewal costs shall be \$266,459.42.
5. This Amendment shall be construed in connection with and as part of the Original Agreement and shall modify and supersede all provisions contained in the Original Agreement relating to the subject matter set forth herein. Except as modified and expressly amended by this Amendment, all terms, conditions and covenants contained in the Original Agreement and all prior amendments thereto are hereby ratified and shall be and remain in full force and effect.

[signature page to follow]

IN WITNESS WHEREOF, the Parties to this Amendment by their duly authorized representatives have executed this Amendment the day and year below.

**CONTRACTOR:**

Blackbaud, Inc.

By: \_\_\_\_\_

Name Printed: \_\_\_\_\_

Brian Boruff

Title: \_\_\_\_\_

President, ECBU

Date: \_\_\_\_\_

06/21/2018

**PURCHASING AGENCY:**

Virginia Commonwealth University

By: \_\_\_\_\_

Name Printed: \_\_\_\_\_

Karl Kain Gray

Title: \_\_\_\_\_

SR. VP and CFO

Date: \_\_\_\_\_

6/20/18

# Blackbaud Scope of Customer Support

This Blackbaud Solutions Agreement is entered into by You and Blackbaud and each party agrees as follows:

## 1. Scope of Customer Support

Customer Support provides assistance to customers using local (onpremise) and hosted Subscriptions. Customer Support will help You understand the capabilities of Your Subscription, including how to navigate your Subscription and answering related questions for core concepts of features and functionality. Customer Support will work diligently to investigate all causes of a reported issues or incident to ensure that it is not caused by a error in the Subscription or Our environments. We will empower You with self-help resources, such as Knowledgebase, to help you feel confident and self-sufficient in Your Subscription and its capabilities ultimately to help in the execution of Your mission. As part of an active Subscription, We will provide the following Customer Support functions:

- Diagnosing and troubleshooting problems, issues or Errors within the Subscription, We will use reasonable efforts to correct Errors in the Subscription that are attributable to programming in the Subscription. All issues will be handled based on Severity and evaluated for future Major Releases and Subscription Updates.
- Diagnosing and troubleshooting data Errors. We will use reasonable efforts to correct data-related Errors that are materially attributable to a Solution Update or Major Release in the Subscription. If data anomalies are not directly due to an Error in the Subscription, additional fees may apply.
- Providing Major Releases, Subscription Updates, and the appropriate Documentation as they become available. Our support website is the primary means of communicating information about the Subscription.
- Navigating Our Documentation, including knowledgebase articles and user guides, as needed.
- Answering questions about Major Releases or Subscription Updates, and troubleshooting the Subscription, if the Subscription is licensed and sold as a locally-installed instance. If We host Your Subscription, locally-installed instances of the Subscription are not supported.

## 2. Authorized Support Contacts

- a. Authorized Support Contacts are the primary liasons between Us for Customer Support issues. You may assign up to six (6) Authorized Support Contacts for your Subscriptions. Your site administrators can add, remove, and administer rights for Authorized Support Contacts on our support website. For security reasons, Blackbaud Customer Support will not add new Authorized Support Contacts for your organization without proper authentication from a site administrator nor assist Your users with questions if they are not an Authorized Support Contact. Third-parties (e.g., consultants) are not eligible to be a Authorized Support Contact unless they are on a semi-permanent status with Your organization, as exhibited by an email address and user account in Your organization's domain name. Our Customer Support will work solely with the Authorized Support Contacts and will only work directly with Non-Authorized Users if reasonably needed by Our Customer Support team.



- b. Authorized Support Contacts are required to be trained on the Subscription. In the event of Authorized Support Contact staff turnover, You are required to provide training to new Authorized Support Contacts within 30 days of a new Authorized Support Contact being designated. Training shall include, at a minimum, Our troubleshooting practices, functionality of the Subscription and internal business practices. All such training is to be provided at Your expense.
- c. Your Authorized Support Contacts retain the responsibility for providing internal support for the Subscription, including:
  - Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
  - Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users
  - If after using reasonable efforts You are unable to diagnose or resolve Errors within the Subscription, Authorized Support Contacts may contact Our Customer Support with the troubleshooting performed, steps to duplicate, and any additional information (e.g., logs, extracts) that can aid in the resolution of the reported incident.

### 3. Severity Definitions and Response Times

The following are definitions of issue severities and how Blackbaud will respond during normal business hours (12x5) or after-hours (24x7).

INCIDENT SEVERITY	DEFINITION	RESPONSE TARGET	ONGOING RESPONSE TARGET
<b>Severity 1 (Critical)</b>	Critical production incident that materially impacts Your use of the Subscription, by either (i) preventing access to the Subscription or (ii) rendering a mission-critical feature/function unavailable. No Commercially Reasonable Workaround exists. Examples: Database access is down or unavailable for all users; Donation pages are down. Note: Severity 1 issues require You to have dedicated resources available to work on the issue on an ongoing basis with Us.	30 minutes (24x7)	Hourly updates
<b>Severity 2 (High)</b>	Major functionality is impacted or significant performance degradation is experienced in the Subscription. The situation is causing a high impact to portions of Your business operations and no Commercially Reasonable Workaround exists. The Subscription is operational but highly degraded performance to the point of a material impact on usage.	2 business hours (12x7)	Daily
<b>Severity 3 (Medium)</b>	Partial, non-critical loss of use of the Subscription with a medium-to-low impact on You, but You continue to be able to conduct Your business.	4 business hours (12x5)	Every 2 business days
<b>Severity 4 (Low/Cosmetic)</b>	Inquiry regarding a routine technical issue; information requested on application capabilities, navigation, installation or configuration; Error affecting a small number of users with Commercially Reasonable Workarounds available	8 business hours (12x5)	Every 2 business days

\*For Severity 3 and 4, We agree to continue to provide continued updates until such time the issue has been triaged for a future patch or release.



## 4. Exclusions and Limitations on Customer Support

- a. To ensure the integrity of the Subscription, You are responsible for remaining current on Subscription or maintenance fees for all Subscriptions as long as it is in use. Our Customer Support does not provide support by-the-hour. If You cancel Your ongoing Subscription, reinstatement of your annual maintenance fee or Subscription service will be required in order for Blackbaud to assist You.
- b. You acknowledge that certain issues may not be addressed except through a Subscription Update or Major Version of the Subscription. We reserve the right to limit the Scope of Customer Support provided to You if You have elected to not maintain the production version of the Subscription on the most current Major Release and Subscription Update. Should We effect a Planned Obsolescence on the Subscription, or portions of the Subscription, We will provide You with prior written notice, as soon as reasonably possible, in advance of the Planned Obsolescence effective date.. Such notice shall be at least one (1) year prior to the Planned Obsolescence effective date.
- c. Beyond Customer Support, we also have additional services and customer success programs available to You. Although Customer Support does not provide the following services, these may be already available to You under other agreements with Blackbaud:
  - Training or other types of educational services, which would include guided walk-throughs that train the user on the basics of how to create queries, imports, exports, reports.
  - Database administrator functions or assistance, such as guided walk-throughs on the installation of a Major Releases or Subscription Updates on Your infrastructure. This includes the installation or troubleshooting of third-party solutions or hardware, such as Citrix, VPN, firewalls, SSL certificates, load balancers (e.g., NetScaler), or SQL Server / SQL Reporting Services.
  - Managed services and staff augmentation, such as data entry services or business process testing for Major Releases or Subscription Updates.
  - Professional services, such as implementation or configuration of your Solution or the creation or alteration of custom code, whether created by You or Blackbaud. This includes resolving defects in your custom code, alterations to custom web forms/pages, assistance in creation of your own custom code or custom web forms using SDKs or APIs, or the creation or alteration of custom reports, using tools such as Crystal Reports or Microsoft SQL Reporting Services.
  - Troubleshoot, debug, or provide code samples for Customizations, which includes training or advice of how to use Our APIs and SDKs for the purpose of creating Your Customizations. This includes providing web design advice, alterations or resolution for web pages, whether created by Blackbaud or You.

## 5. Definitions

- “Commercially Reasonable Workaround” means alternative programmatic steps or environmental changes that achieve the end goal of the Subscription function.
- “Customer Support” means the group providing support services described herein
- “Customization” means an alteration to the Subscription written by Blackbaud, You, or a third-party on behalf of either of Us.
- “Errors” means errors in the Subscription that result in a Severity 1 or Severity 2 incident.
- “Major Release” means a new version of the Subscription made generally available to Blackbaud customers and built on the same platform.
- “Authorized Support Contacts” means Your designated internal support resources serving as the key liaisons between Us for technical support of the Subscription.
- “Non-Authorized User” means users, end users, or contacts at Your organization who are not designated to

contact Customer Support as an Authorized Support Contact.

- “Planned Obsolescence” means a period during which We no longer market, support, or maintain the Subscription, or features of the Subscription.
- “Subscription Updates” means patches and service packs for the Subscription, typically to resolve defects or release minor enhancements to the most current Major Release..
- “Subscription” means any Blackbaud subscriptions, including maintenance, support, application services and payment services provided by Blackbaud pursuant to an Order Form.

\*NOTE: If you are a Blackbaud Partner (e.g., technology partner), your Scope of Customer Support is defined and governed under a separate agreement.

## About Blackbaud

Blackbaud (NASDAQ: [BLKB](#)) is the world’s leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, corporations, education institutions, healthcare institutions, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for fundraising and CRM, marketing, advocacy, peer-to-peer fundraising, corporate social responsibility, school management, ticketing, grantmaking, financial management, payment processing, and analytics. Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, and the United Kingdom. For more information, visit [www.blackbaud.com](http://www.blackbaud.com).



COMMONWEALTH OF VIRGINIA  
STANDARD CONTRACT

**Contract Number: 5799845JC**

This contract entered into by Blackbaud, Inc., hereinafter called the "Contractor" or "Blackbaud" and Commonwealth of Virginia, Virginia Commonwealth University, called the "Purchasing Agency" or "Client."

**WITNESSETH** that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

1. **PERIOD OF THE PERFORMANCE:** In accordance with the Term section of the Blackbaud Solutions Agreement.
2. **SCOPE OF CONTRACT:** The Contractor shall provide the goods/services to the Purchasing Agency as set forth in the Contract Documents.
3. **CONTRACT:** The contract documents shall consist of:
  - (1) This signed form;
  - (2) Blackbaud Agreement to Purchase;
  - (3) Statement of Work;
  - (4) Blackbaud Solutions Agreement; and
  - (5) The Request for Proposals #5799845JC dated December 19, 2013 including Addendum #01 dated January 13, 2014; and
  - (6) The Contractor's Proposal dated January 30, 2014.
4. The attached Exhibit A sets out the preferred pricing for the Virginia Association of State College & University Pricing Professionals (VASCUPP). For VASCUPP institutions who purchase Blackbaud solutions pursuant to Exhibit A, the contract shall be comprised as follows: (1) This signed form; (2) a Blackbaud Agreement to Purchase; (3) Statement(s) of Work for Services; and (4) the Blackbaud Solutions Agreement; (5) The Request for Proposals ##5799845JC dated December 19, 2013 including Addendum #01 dated January 13, 2014; and (6) The Contractor's Proposal dated January 30, 2014.

All of which documents are incorporated herein by reference. The contract documents constitute the complete and entire Agreement, and supersede all prior or contemporaneous oral or written agreements concerning such subject matter. In the event of any conflict among the terms of this Agreement, the order of precedence shall be as set forth above.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

**CONTRACTOR:**

Blackbaud, Inc.

By: 

Name Printed: Jon W. Olson

Title: VP and General Counsel

Date: 6/16/2014

**PURCHASING AGENCY:**

Virginia Commonwealth University

By: 

Name Printed: William Decatur

Vice President, Finance &  
Administration and Chief Financial

Title: Officer

Date: 6/18/14



# Blackbaud Solutions Agreement

This Blackbaud Solutions Agreement (“**Agreement**”), effective as of the execution of the contract (“**Effective Date**”), is made by and between Blackbaud, Inc., a Delaware corporation having a place of business at 2000 Daniel Island Drive, Charleston, SC 29492, and Client. “**Blackbaud**” means Blackbaud, Inc. and its affiliates and subsidiaries. “**Client**” means Virginia Commonwealth University. “**Party**” means Blackbaud or Client. “**Parties**” means Blackbaud and Client collectively.

The Parties agree as follows:

## 1. DEFINITIONS.

Defined terms shall have the meanings set forth in this Agreement.

## 2. ORDERING PROCEDURE.

Blackbaud will furnish to Client and Client will pay for Blackbaud software (“**Software**”), subscription(s), including application services and payment services (“**Subscription**” or “**Application Services**”), support and maintenance (“**Maintenance**”), and other professional, consulting or training services (“**Services**”), which may be further specified in a statement of work (“**SOW**”), detailed in the applicable order form (“**Order Form**”). Software, Subscriptions, Maintenance, and Services are each individually a “**Blackbaud Solution**” and collectively “**Blackbaud Solutions.**”

## 3. FEES, EXPENSES, & PAYMENT.

**a. Fees and Taxes.** Fees are described in the applicable Order Form. Client shall provide Blackbaud with a valid tax exemption certificate prior to the Effective Date and shall maintain a current tax exemption certificate on file with Blackbaud and promptly notify Blackbaud if Client's tax status changes.

**b. Expenses.** Client shall reimburse Blackbaud for all reasonable and necessary travel and living expenses Blackbaud incurs performing Services, all such expenses to be incurred pursuant to Client's then-current travel policy.

**c. Invoices.** Initial Invoices for Software, Subscriptions, and Maintenance will be issued upon Blackbaud making the Software available for download. All other invoices will be issued as follows: (i) invoices for

Services will be issued in accordance with the applicable SOW, or if not specified in the SOW, invoices for time-and-materials Services will be issued in arrears for Services hours provided in the preceding invoicing period and invoices for fixed price Services will be issued at deliverable completion; (ii) renewal invoices for Subscriptions and Maintenance will be issued at least thirty (30) days prior to the start of the renewal term.

**d. Payments and Late Payments.** Payment is due within thirty (30) days of invoice receipt by Client. Payments must be made without deduction or offset, except for those amounts for which there is a good faith dispute.. All payments are non-refundable (except as set forth in Section 8 (a)(i) below). All invoices shall be deemed final and binding unless Client notifies Blackbaud in writing of any alleged discrepancies no later than thirty (30) days from the date of such invoice. Blackbaud reserves the right to invoice Client interest in accordance with Virginia law for any outstanding invoice (other than those under good faith dispute) not paid within thirty (30) days after receipt.

#### 4. CONFIDENTIAL INFORMATION.

**a. Definitions. "Confidential Information"** means (i) all information disclosed by the Owner to the Recipient orally, electronically, visually or in a tangible form which is either (a) marked as "confidential" (or with a similar legend), (b) is identified at the time of disclosure as being confidential, or (c) should be reasonably understood to be confidential or proprietary. Confidential Information includes, trade secrets, computer programs, software, documentation, formulas, data, inventions, techniques, marketing plans, strategies, forecasts, client lists, donor, prospect, and donation information, employee information, financial information, confidential information concerning Owner's business or organization, information concerning any of Owner's past, current, or possible future products or methods, including information about Owner's research, development, engineering, purchasing, manufacturing, accounting, marketing, selling, leasing, and software. **"Owner"** means the Party providing Confidential Information to the Recipient. **"Recipient"** means the Party receiving Confidential Information from the Owner. Blackbaud acknowledges that Client is subject to the requirements of the Virginia Freedom of Information Act and agrees to provide Client with reasonable assistance and information as and when necessary to enable Client to comply with any information disclosure requirements. Client acknowledges that certain information, including all aspects of the Blackbaud Products, methodology and Documentation, as well as such other items that Blackbaud may so designate in a letter format to Client, is confidential and proprietary to Blackbaud and if disclosed would prejudice Blackbaud's commercial interests. Client agrees (i) to take Blackbaud's position fully into account; and (ii) not to prejudice Blackbaud's commercial interests.

**b. Ownership of Confidential Information.** Recipient shall not obtain any rights, title, or interest in any Confidential Information of Owner.

**c. Treatment of Confidential Information.**

i. Recipient shall only (i) use Owner's Confidential Information to carry out the purposes of this Agreement; and (ii) disclose Owner's Confidential Information to those third parties operating under non-disclosure provisions no less restrictive than those set forth in this Section 4 and who have a "need to know" based on reasonable business justifications. Each Party shall protect the other Party's Confidential Information using the same degree of care it uses to protect its own confidential and proprietary information, but in any case not less than reasonable care, and shall protect the other Party's Confidential Information in accordance with applicable laws.

ii. This Agreement imposes no obligation upon the Parties with respect to Confidential Information which either Party can establish by legally sufficient evidence: (a) was in the possession of, or was rightfully known by the Recipient without an obligation to maintain its confidentiality prior to receipt from Owner; (b) is or becomes generally known to the public without violation of this Agreement; (c) is obtained by Recipient in good faith from a third party having the right to disclose it without an obligation of confidentiality; (d) is independently developed by Recipient without the participation of individuals who have had access to any Confidential Information; or (e) is required to be disclosed by court order or applicable law, provided Recipient promptly gives notice to Owner of such disclosure (to the extent legally permissible) and undertakes reasonable efforts to limit such disclosure.

## 5. LICENSE AND ACCESS.

**a. License Grant.** Blackbaud grants to Client, and Client accepts, an irrevocable (subject to Section 5(b) below), nontransferable, nonassignable, nonsublicensable, nonexclusive, and perpetual (subject to Section 5(b) below) license to use one (1) copy of the Software in machine readable object code form only ("**License**"). The License includes the right to use the applicable manuals and documentation that Blackbaud generally provides or makes available for Blackbaud Solutions ("**Documentation**") solely for the furtherance of Client's internal business purposes. The License extends to the computer program delivered by Blackbaud and updates provided by Blackbaud pursuant to Client's continued enrollment in Maintenance and, where applicable, applications created by or on behalf of Client utilizing the Application Programming Interface, Software Development Kit, or Visual Basic for Application contained in the Software ("**Blackbaud Tools**"). Client may only install and use the Software (i) in accordance with Section 5(f) below, and (ii) in a manner that ensures that Client's simultaneous use of and access to the Software will be limited as set forth in the applicable Order Form. Unless otherwise expressly set forth in an Order Form, Client shall not share Licenses with subsidiaries or affiliates without the express written agreement of Blackbaud and Client's payment of additional License fees.

**b. License Termination.** Unless terminated pursuant to this Section 5(b), the License is effective in perpetuity. Client may terminate a License at any time by providing written notice to Blackbaud. Blackbaud shall have the right to terminate a License by providing written notice to Client (i) upon Client's failure to pay when due any undisputed invoices for License or Software fees issued pursuant to this Agreement, provided that Blackbaud has given Client at least thirty (30) days prior notice of Blackbaud's intention to terminate the



License and Client fails to pay the undisputed invoice during that thirty (30) day period, provided that in the case of a License termination pursuant to this Section 5.b.ii, such termination shall be limited to the License or Software (or applicable part thereof) to which such past due undisputed invoice relates (ii) upon Client's failure to cure a material default pursuant to Section 15(b), or (iii) if Blackbaud is unable, using commercially reasonable efforts, to obtain the right for Client to continue using the Software if the Software becomes the subject of an infringement claim for which Blackbaud is indemnifying Client pursuant to Section 8 below. Within fifteen (15) days of the effective date of termination of a License Client shall return all copies of the Software to Blackbaud or certify in writing to Blackbaud that it has destroyed or erased all copies of the Software.

**c. Subscription Access.** Blackbaud grants to Client, and Client accepts, a nonassignable, nontransferable, nonsublicensable, and nonexclusive right to access the Subscription and use the Subscription and Documentation solely for the furtherance of Client's internal business purposes during the Subscription term set forth on the Order Form. Subscriptions will not be provided to Client on any form of media and will not be installed on any servers or other computer equipment owned or otherwise controlled by Client. During the Subscription term Blackbaud shall provide Client with secure access to the latest supported version of the Subscription, to be accessed and used by Client through the use of the Internet. Blackbaud shall provide Client with administrator rights permitting secure administrator access and allowing the administrator to create other users to access the Subscription. Client agrees that it has elected to access the Blackbaud offering through a Subscription and that this Agreement confers no right to convert the Subscription to a License as described in Section 5(a). Client's use of the Subscription is subject to the scope of the use provisions above and unless otherwise expressly set forth in an Order Form, Client shall not share Subscriptions with subsidiaries or affiliates without the express written agreement of Blackbaud and Client's payment of additional Subscription fees.

**d. Subscriptions and Maintenance.** Unless cancelled in accordance with this section, Subscriptions and Maintenance shall renew for consecutive one (1) year terms following the initial term set forth on the Order Form. Renewal fees for Subscriptions and Maintenance are subject to adjustment as set forth in the applicable Agreement to Purchase. Blackbaud shall send Client a renewal notice for Subscriptions and Maintenance at least sixty (60) days prior to the start of the renewal term. Client may cancel a Subscription or Maintenance by providing written notice to Blackbaud at least thirty (30) days prior to the start of the renewal term. No credit or refunds will be given for partial Subscription or Maintenance periods. Cancellations will become effective as of the final day of the then-current term. Reinstatement of a lapsed Subscription or Maintenance requires full payment of fees that would have been due from the expiration of the last active term through the reinstatement date.

**e. Copyright.** Blackbaud Solutions (i) contain trade secret and proprietary information owned by Blackbaud or its third party licensors and (ii) are protected by United States and international copyright laws and trade provisions. Except for copies as may be required by Client for backup or archival purposes, Client may not disclose, copy, transfer or transmit Blackbaud Solutions for any purpose. All permitted copies of Blackbaud

Solutions must retain Blackbaud's copyright and other proprietary notices and be identified as Blackbaud

Confidential Information. Client agrees that all right, title, and interest in and to Blackbaud Solutions remains with Blackbaud and its third party licensors.

**f. System Requirements.** Certain Blackbaud Solutions may only be used or accessed from Client's computer systems that meet the Blackbaud system requirements published at <https://www.blackbaud.com/systemrequirements>, which Client acknowledges it shall have reviewed prior to the Effective Date.

**g. Suspension; Acceptable Use Policy.** Blackbaud may suspend Client's use of or access to Blackbaud Solutions upon written notice to Client (i) in response to Client's failure to pay when due any undisputed invoices issued pursuant to this Agreement, provided that Blackbaud has given Client at least thirty (30) days prior notice of Blackbaud's intention to suspend the Blackbaud Solution and Client fails to pay the undisputed invoice during that thirty (30) period, or (ii) in response to a violation by Client of the acceptable use policy posted at: <http://internet.blackbaud.com/eua/aupolicy> ("AUP"). Blackbaud will lift any payment-related suspension promptly following Client's payment of the undisputed invoice on which the suspension is based. When exercising its right to suspend a Blackbaud Solution for a breach of the AUP, Blackbaud will respond in a manner proportionate to the severity of the violation (e.g., when a single user has breached the AUP, by suspending Subscription access to the user rather than suspending all users or Blackbaud Solutions). With respect to any suspension, Blackbaud and Client agree to work together in good faith to address the violation in a reasonable manner, to prevent similar violations in the future, and to reinstate the suspended Blackbaud Solution as quickly as possible.

## 6. SECURITY.

Blackbaud will use commercially reasonable efforts to maintain database security for online financial transactions and Client Confidential Information. Blackbaud uses industry standard encryption technologies to transmit Client Confidential Information. Blackbaud also employs industry standard network security techniques including firewalls, virus and intrusion detection, and authentication protocols. With respect to online financial transactions conducted through Blackbaud Solutions the relevant portions of the applicable Blackbaud Solution are maintained in compliance with the Payment Card Industry Data Security Standard ("PCIDSS"). Client understands that Blackbaud Solutions include sending email and publishing web-pages over the Internet using SMTP or HTTP protocols, and that these standard protocols do not support many enhanced data security protections. In no case will the use of the Internet in this manner be deemed to violate Blackbaud's obligations under this Agreement. Blackbaud reserves the right, in its sole discretion, to change or modify its data security program at any time, but at all times will maintain commercially reasonable database security. Client shall take commercially reasonable security precautions to prevent

unauthorized or fraudulent use of Blackbaud Solutions by Client, Client's employees, agents or any other third parties.

## 7. CLIENT OBLIGATIONS.

**a. Client Control.** Client shall be solely responsible for administering and monitoring the use of login IDs and passwords by its administrators and users. Upon the termination of employment of any such Client administrator or user Client will immediately terminate access by the login ID and password of that individual to Blackbaud Solutions. Client shall be responsible for using commercially reasonable practices to protect Client Confidential Information it shares with Blackbaud. Blackbaud is not responsible for any damages resulting from Client's failure to manage the confidentiality of its login ID and passwords. Blackbaud will not solicit any contributions for or on behalf of Client, and will not employ or procure any person to do so.

**b. Prohibited Uses.** Client shall not modify, rent, sublease, sublicense, assign, use as a service bureau, copy, lend, adapt, translate, sell, distribute, derive works from, decompile, or reverse engineer Blackbaud Solutions, except as explicitly permitted hereunder. Unless otherwise expressly set forth in an Order Form, Blackbaud Solutions shall be used solely by Client, and not (by implication or otherwise) by any subsidiary or affiliate of Client. In addition, Client shall not use Blackbaud Solutions for any benchmarking or competitive purposes. Client shall not: (a) send or store material containing software viruses, worms, Trojan horses or other harmful computer code, files, scripts, agents or programs in, to or from Blackbaud Solutions; (b) interfere with or disrupt the integrity or performance of Blackbaud Solutions, or the data contained therein; (c) use Blackbaud Solutions in a manner inconsistent with applicable Documentation; or (d) attempt to gain unauthorized access to Blackbaud Solutions or related systems or networks.

## 8. INDEMNITY.

### a. Patent and Copyright Indemnity.

- i. Blackbaud shall indemnify and defend Client against any third party claims that Blackbaud Solutions as delivered or made available to Client infringe any United States or Canadian patent, trademark, or copyright owned by such third party. Blackbaud shall, in its reasonable judgment and at its option and expense: (a) obtain for Client the right to continue using the affected Blackbaud Solution; (b) replace or modify the Blackbaud Solution so that it becomes non-infringing while giving equivalent performance; or (c) if Blackbaud cannot obtain the remedies in (a) or (b), as its sole obligation, terminate the License or access to the infringing Blackbaud Solution and, in the case of Software, refund a pro-rata amount based on the original License fees paid by Client to Blackbaud for such Software adjusted to reflect the period of beneficial use of the Software by Client, and in the case of any infringing Blackbaud Solution, any pre-paid Subscription or Maintenance fees related to such Blackbaud Solution.

- ii. Notwithstanding Section 8(a)(i), Blackbaud shall have no liability to indemnify and defend Client to the extent (a) the alleged infringement is based on infringing information, data, software, applications, services, or programs created or furnished by or on behalf of Client; (b) the alleged infringement is the result of a modification made by anyone other than Blackbaud; or (c) Client uses the Blackbaud Solution other than in accordance with this Agreement, any Documentation or any delivered Documentation under a SOW(s).
- iii. This Section states the entire liability of Blackbaud with respect to any type of infringement claim.

**b. Client Responsibilities.** To the extent permitted by the Virginia Tort Claims Act, Section 8.01-195.1 et seq. of the Code of Virginia (1950), as amended, Client shall be responsible for the negligent acts or omissions of its officers, employees, agents or students. Nothing contained herein shall constitute a waiver of the sovereign immunity of Client or the Commonwealth of Virginia.

**c. Indemnification Procedures.** Client shall give Blackbaud prompt written notice of any claims for indemnification and Client agrees to relinquish control of defending any such claim in accordance with Chapter 5, Title 2.2 of the Virginia Code to Blackbaud, including the right to settle; provided however, that Blackbaud will not settle any such suit or claim without Client's prior written consent if such settlement would be materially adverse to Client's interests.

## 9. REPRESENTATIONS, WARRANTIES, AND DISCLAIMER.

**a. Mutual Representations and Warranties.** Each Party represents and warrants that (i) it has the right and power to enter into this Agreement, (ii) an authorized representative has accepted this Agreement, and (iii) it will comply with all applicable laws and regulations pertaining to this Agreement.

### **b. Blackbaud Warranties.**

- i. **Services.** Blackbaud warrants that the Services will be performed in a professional and workmanlike manner in accordance with industry standards.
- ii. **Software and Subscriptions.** Blackbaud warrants that Software and Subscriptions will perform substantially in conformance with the functional specifications in the then-current Documentation, provided that, in the case of Software, Client maintains active enrollment in Maintenance. This warranty does not apply if the Software or Subscription is not administered in accordance with the applicable instructions and training provided by Blackbaud. If the Software or Subscription fails to operate as warranted in this Section and Client notifies Blackbaud in writing of the nature of the non-conformance, Blackbaud will use commercially reasonable efforts to promptly repair or replace the non-conforming Software or Subscription without charge. The foregoing provides Client's sole and exclusive remedy for breach of this warranty.

c. **Disclaimer.** Other than applications made by or on behalf of Client using the Blackbaud Tools and within the scope of Section 5(a), any modifications that Client makes to Blackbaud Solutions will void any warranty obligations set forth in this Agreement as well as any Maintenance. EXCEPT FOR THE REPRESENTATIONS AND WARRANTIES SET FORTH IN THIS SECTION 9, BLACKBAUD EXPRESSLY

DISCLAIMS ALL REPRESENTATIONS AND WARRANTIES, WHETHER EXPRESS, IMPLIED, OR STATUTORY (BY ANY TERRITORY OR JURISDICTION) TO THE EXTENT PERMITTED BY LAW, AND FURTHER BLACKBAUD EXPRESSLY EXCLUDES ANY WARRANTY OF NON-INFRINGEMENT, TITLE, FITNESS FOR A PARTICULAR PURPOSE, OR MERCHANTABILITY.

#### 10. LIMITATION OF LIABILITY.

a. EXCEPT FOR THE INDEMNIFICATION OBLIGATIONS SET FORTH IN SECTION 8, CLAIMS FOR PERSONAL INJURY OR PROPERTY DAMAGE, AND CLIENT'S PAYMENT OBLIGATIONS, EACH PARTY'S MAXIMUM LIABILITY TO THE OTHER PARTY FOR ANY ACTION ARISING UNDER THIS AGREEMENT, REGARDLESS OF THE FORM OF ACTION AND WHETHER IN TORT OR CONTRACT, SHALL BE LIMITED TO THE GREATER OF (X) \$25,000 OR (Y) THE AMOUNT OF FEES PAID OR PAYABLE BY CLIENT FOR THE BLACKBAUD SOLUTION FROM WHICH THE CLAIM AROSE DURING THE SIX (6) MONTHS PRECEDING THE CLAIM. IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR INDIRECT, SPECIAL, INCIDENTAL, OR CONSEQUENTIAL DAMAGES OF ANY KIND, EVEN IF A PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THE PARTIES AGREE TO THE ALLOCATION OF RISK SET FORTH HEREIN.

b. Blackbaud shall have no liability under this Agreement with respect to: (i) customizations created by or on behalf of Client; (ii) use of Blackbaud Solutions by or on behalf of Client other than in accordance with this Agreement and the Documentation; (iii) combination use, failures or incompatibility caused by third party software or hardware not supplied by Blackbaud; (iv) modifications to Blackbaud Solutions other than those contemplated in Section 9(c); (v) Client's failure to timely install updates to Blackbaud Solutions; or (vi) compliance with designs, plans or specifications furnished by or on behalf of Client.

#### 11. OWNERSHIP.

a. **Client Ownership and License.** Subject to the rights of Blackbaud set forth below, Client has all right, title, and interest in and to all Client Confidential Information and all Client-provided artwork, logos, trade names, and trademarks ("**Client Content**"). Solely to the extent necessary for Blackbaud and its agents to perform their obligations under this Agreement, Client grants to Blackbaud and its suppliers a non exclusive, fully paid-up license to use, reproduce, store, modify, and publicly display Client Confidential Information and Client Content.

b. **Blackbaud Ownership and License.** Subject to the rights of Client set forth above, Blackbaud has all right, title, and interest in and to any expressions and results of Blackbaud Solutions, the work, findings,

analyses, conclusions, opinions, recommendations, ideas, techniques, know-how, designs, programs, tools, applications, interfaces, enhancements, other technical information, and all derivatives of the foregoing created in connection with this Agreement (“**Work Product**”). Blackbaud grants to Client a nonexclusive, fully paid-up license to use Work Product, solely to the extent necessary for Client and its end users to use Blackbaud Solutions in accordance with this Agreement. If Client provides any feedback, comments, suggestions, ideas, requests, or recommendations for modifications or improvements to Blackbaud (“**Feedback**”), Client hereby assigns all right, title, and interest in any such Feedback to Blackbaud to be used for any purpose. All rights not expressly granted to Client hereunder are reserved by Blackbaud.

**c. Results.** Client agrees that Blackbaud may (a) aggregate benchmarking results of Client’s use of Blackbaud Solutions with results of other clients’ use (collectively “**Results**”), and (b) use and disclose the Results for any purpose provided that the Results do not individually identify Client, Client’s Confidential Information, or Client’s use of Blackbaud Solutions.

## 12. NOTICE.

All notices or other communications referenced under this Agreement shall be made in writing and, in the case of Blackbaud, sent to the address designated above, or in the case of Client, sent to the address set forth on the Order Form, or as designated from time to time in writing by the Parties. All notices shall be deemed given to the other Party if delivered receipt confirmed using registered or certified first class mail, postage prepaid, or recognized courier delivery. Operational notices, such as those related to payments or renewals, may be delivered in any reasonable manner, including email.

## 13. FORCE MAJEURE.

Neither Party shall be liable for any failure to perform its obligations under this Agreement if prevented from doing so by a cause or causes beyond its reasonable control (each such cause, a “**Force Majeure**”). Any delay in performance due to Force Majeure will be excused for the duration of the event of Force Majeure and the obligations of the Parties will resume immediately upon written notice from the non-performing Party that it is again able to perform.

## 14. DISPUTE RESOLUTION; GOVERNING LAW.

Disputes and claims arising out of this Agreement first will be submitted to senior management of both Parties for amicable resolution. If the Parties cannot settle the matter within a reasonable period of time, the dispute or claim shall be submitted to and resolved in accordance with the General Terms and Conditions. Notwithstanding the foregoing, either Party may sue in any court for infringement of its proprietary or intellectual property rights or to seek injunctive relief and Blackbaud may sue in any court to collect unpaid amounts. This Agreement shall be governed by the laws of the Commonwealth of Virginia, excluding choice of law principles.

## 15. TERM AND TERMINATION.

a. **Term.** The term of this Agreement shall commence on the Effective Date and continue as set forth below:

- a. **Legal terms and conditions:** Shall continue to be in force for as long as Client has active purchases under this Agreement;
- b. **License:** Shall continue as set forth in Section 5.b above;
- c. **Subscriptions and Maintenance:** Shall continue as set forth in Section 5.d above; and
- d. **Services:** Shall continue as set forth in the applicable SOW.

b. **Default.** In accordance with the Termination for Default terms in the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, either Party may terminate this Agreement if the other Party materially defaults in performing any of its obligations under this Agreement and the default remains uncured for at least thirty (30) days following receipt of written notice from the non-defaulting Party. Upon written notice from either Party, this Agreement shall also terminate upon (i) the making of an assignment for the benefit of creditors by a Party, or (ii) the dissolution of a Party.

c. **Effect of Termination.** Upon termination of this Agreement or termination of a Blackbaud Solution, Blackbaud may immediately cease providing any such terminated offering. Where Blackbaud hosts Client's database, Blackbaud will provide a copy of such database to Client upon termination. To the extent an archive copy of Client's database or Client Confidential Information was created by Blackbaud during the course of performing its obligations under this Agreement, Client agrees that Blackbaud may retain such copies following termination subject to Blackbaud's internal practices for record destruction. If this Agreement is terminated for any reason, Client shall nonetheless be obligated to pay Blackbaud upon such termination any and all accrued and unpaid fees and expenses due and payable to Blackbaud as of the date of termination.

d. Section 9.G.3 of the Purchasing Manual for Institutions of Higher Education and their Vendors, Termination for Convenience, shall not apply under the Contract.

## 16. MUTUAL PUBLICITY.

Except for disclosures required by law, Blackbaud may only use Client's name, logo or other identifying information when in each case Client has provided written consent, which shall not be unreasonably withheld. Except for disclosures required by law, Client agrees not to issue a press release or public statement relating to this Agreement or its terms or use Blackbaud's name, logo, or other identifying information unless in each case Blackbaud has provided written consent, which shall not be unreasonably withheld. Any such disclosures or uses of name, logos, and identifying information shall be in good taste, shall not be disparaging and shall uphold the professional standards and goodwill associated with Blackbaud.

**17. GENERAL.**

Except as otherwise specifically stated herein, remedies shall be cumulative and there shall be no obligation to exercise a particular remedy. No failure or delay in enforcing any term, exercising any option, or requiring performance shall be binding or construed as a waiver unless agreed to in writing by a duly authorized representative of each Party. If any provision of this Agreement is held to be unenforceable, the other provisions shall remain in full force and effect. No purchase order or other ordering document that purports to modify or supplement the printed text of this Agreement or any attached or referenced document shall add to or vary the terms of this Agreement. All proposed modifications, variations, edits, or additions to this Agreement, Order Form(s) or SOW(s) are objected to and deemed material unless otherwise mutually agreed to in writing. Order Forms may be executed in counterparts, which together form one legal instrument. An executed copy of an Order Form made by reliable means shall be considered an original. Either Party may assign its rights or obligations under this Agreement with the non-assigning Party's written consent, such consent not to be unreasonably withheld, provided, however, that Blackbaud may assign its rights and obligations in connection with a change of control without Client's consent. Except as explicitly stated in this Agreement, nothing in this Agreement is intended to confer on third party any right, benefit or remedy of any nature. Blackbaud performs its obligations under this Agreement as an independent contractor, not as an employee of Client. Nothing in this Agreement is intended to construe the existence of a partnership, joint venture, or agency relationship between Client and Blackbaud. Client shall not contract for services related to the Services detailed in the applicable SOW(s) with any current or former Blackbaud employees or subcontractors for a period of six (6) months from the date their agreement or employment relationship with Blackbaud terminated.

Any provision of this Agreement that contemplates performance or observance subsequent to termination of the Agreement, regardless of the date, cause or manner of such termination, shall survive such termination and shall continue in full force and effect.







# Request for Proposals

RFP #: 5799845JC

RFP Title: Development and Alumni Relations  
Constituent Relationship Management  
System

Date: 12/19/2013



College of William and Mary  
George Mason University  
James Madison University  
Old Dominion University  
Radford University  
The University of Virginia  
Virginia Commonwealth University  
Virginia Military Institute  
Virginia Tech

A VASCUPP Member Institution

## Request For Proposals RFP # 5799845JC

**Issue Date:** 12/19/2013

**Title:** Development and Alumni Relations Constituent Relationship Management System

**Issuing and Using Agency:** Virginia Commonwealth University  
Attention: Jackie Colbert  
10 S 6<sup>th</sup> St., 2<sup>nd</sup> floor  
POB 980327  
Richmond, Virginia 23298-0327

Proposals For Furnishing The Services Described Herein Will Be Received Until: 11:00 AM (EST) local time on 1/28/2014.

All Inquiries For Information Should Be Directed To: ISSUING AGENCY, address listed above or to Phone: (804) 828-0163, Email: [jcolbert@vcu.edu](mailto:jcolbert@vcu.edu), VOICE TDD: (800) 828-1120.

This solicitation & any addenda are posted on the eVa website at: <http://www.eva.virginia.gov>

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

IF PROPOSALS ARE MAILED, SEND DIRECTLY TO VIRGINIA COMMONWEALTH UNIVERSITY, PROPOSAL PROCESS DEPARTMENT, POB 980327, RICHMOND, VA 23298-0327. **IF PROPOSALS ARE HAND DELIVERED OR SENT BY COURIER, DELIVER TO:** VIRGINIA COMMONWEALTH UNIVERSITY, DEPARTMENT OF PROCUREMENT SERVICES, 10 S 6TH ST., 2nd FLOOR, RICHMOND, VA 23219. THE RFP NUMBER, DATE AND TIME OF PROPOSAL SUBMISSION DEADLINE, AS REFLECTED ABOVE, MUST CLEARLY APPEAR ON THE FACE OF THE RETURNED PROPOSAL PACKAGE.

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University Purchasing. Any Work Relative To This Solicitation Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University. **Signature below constitutes acknowledgement of all information contained through links referenced herein.**

### NAME AND ADDRESS OF FIRM:

_____	Date: _____
_____	By (Signature In Ink): _____
_____ Zip Code _____	Name Typed: _____
E-Mail Address: _____	Title: _____
Telephone: ( ____ ) _____	Fax Number: ( ____ ) _____
<b>Toll free, if available</b>	<b>Toll free, if available</b>
DUNS NO.: _____	FEI/FIN NO.: _____
REGISTERED WITH eVA: ( ) YES ( ) NO	SMALL BUSINESS: ( ) YES ( ) NO
VIRGINIA DMBE CERTIFIED: ( ) YES ( ) NO	MINORITY-OWNED: ( ) YES ( ) NO
DMBE CERTIFICATION #: _____	WOMEN-OWNED: ( ) YES ( ) NO

**A Pre-Proposal conference will be held. See Section V, Page 4 herein.**

**THIS SOLICITATION CONTAINS 36 PAGES.**

# Table of Contents

---

I.	PURPOSE:.....	4
II.	OPTIONAL USE CONTRACT: .....	4
III.	THE UNIVERSITY: .....	4
IV.	REPORTING AND DELIVERY REQUIREMENTS:.....	4
V.	PRE-PROPOSAL CONFERENCE: .....	4
VI.	DESCRIPTION OF REQUESTED GOODS/SERVICES AND PROPOSAL RESPONSE REQUIREMENTS AND SUBMISSION INSTRUCTIONS: .....	5
VII.	ORAL PRESENTATION:.....	26
VIII.	EVALUATION AND AWARD CRITERIA:.....	26
IX.	GENERAL TERMS AND CONDITIONS: .....	27
X.	SPECIAL TERMS AND CONDITIONS: .....	27

## APPENDIX A

## APPENDIX B

I. PURPOSE:

The intent and purpose of this Request for Proposals (RFP) is to establish a cooperative term contract with a qualified source for a Constituent Relationship Management (CRM) System to support the Virginia Commonwealth University Division of Development and Alumni Relations programs. The system shall replace the existing alumni and donor database software. Virginia Commonwealth University (the lead issuing institution hereafter referred to as "the University" or "VCU") is an agency of the Commonwealth of Virginia.

The period of the contract shall be from the award through implementation of the CRM system then continuing until the system is fully installed and operational and includes the first warranty/maintenance period. There are up to nine (9) successive one year renewal options of the contract. VCU will consider the option of a longer initial term or renewal term(s) for a potential aggregate term of the contract not to exceed the initial term described above and a total of nine (9) renewal years based upon the attractiveness of the Offeror's proposal.

It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institution or lead-issuing institution's affiliated foundations may access any resulting contract(s) if authorized by the contractor.

Additional information is available at:

[http://procurement.vcu.edu/files/RFP Website Link Cooperative Procurement.pdf](http://procurement.vcu.edu/files/RFP%20Website%20Link%20Cooperative%20Procurement.pdf)

II. OPTIONAL USE CONTRACT:

The resulting contract(s) will be an optional use contract. VCU is in no way required to make purchases from the Contractor and may in its sole discretion purchase the identical and/or similar goods/services from other sources. Any estimates/quantities contained herein do not represent a purchase commitment by VCU.

III. THE UNIVERSITY:

Information is available at:

[http://procurement.vcu.edu/files/RFP Website Link The University.pdf](http://procurement.vcu.edu/files/RFP%20Website%20Link%20The%20University.pdf)

IV. REPORTING AND DELIVERY REQUIREMENTS:

Information is available at:

[http://procurement.vcu.edu/files/RFP Website Link Reporting Delivery Requirements.pdf](http://procurement.vcu.edu/files/RFP%20Website%20Link%20Reporting%20Delivery%20Requirements.pdf)

V. PRE-PROPOSAL CONFERENCE:

**OPTIONAL PRE-PROPOSAL CONFERENCE:** An optional pre-proposal conference will be held at 9:00 AM (EST) on 1/10/2014 at The Office of University Advancement, 909 West Franklin Street, Richmond, VA 23220. The purpose of the conference is to allow potential Offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation.

While attendance at this conference will not be a prerequisite to submitting a proposal, Offerors who intend to submit a proposal are encouraged to attend. Bring a copy of the solicitation with you. Any changes resulting from this conference will be issued in a written addendum to the solicitation.

Offerors may participate in the optional pre-proposal conference via conference call by:

- Using the following "Dial-In" numbers:
- 866-842-5779 (United States & Canada);
- Using Conference Code #: 8415263709
- Dialing the appropriate "Dial-In" number at the scheduled time; and
- Entering the "Conference Code" when prompted, followed by the "#."

Note: Offerors who participated in the pre-proposal conference via conference call shall submit an email to jcolbert@vcu.edu within one (1) business day of the pre-proposal conference, confirming the Offerors participation and the Offeror's contact information.

#### VI. DESCRIPTION OF REQUESTED GOODS/SERVICES AND PROPOSAL RESPONSE REQUIREMENTS AND SUBMISSION INSTRUCTIONS:

This section describes VCU's requested goods and/or services and the areas to be addressed in Offeror's proposal. **The areas to be addressed are italicized and in bold.** Proposal response must be written in the same order as outlined below. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities. Emphasis should be placed on completeness and clarity of content. Failure to submit all information requested may result in the elimination of the proposal from consideration. Proposals which are substantially incomplete or lack key information may be rejected by VCU.

### **Characterization of Development at Virginia Commonwealth University**

The Division of Development and Alumni Relations (DAR) at Virginia Commonwealth University is charged with oversight of the university's alumni relations and fundraising initiatives as well as responsibility for the efficiency and effectiveness of these programs university-wide in cooperation with university partners. The Vice-President for Development and Alumni Relations reports directly to the University President.

#### **A. Development**

The Development program at Virginia Commonwealth University is large and complex. The program strives to maximize philanthropic support for Virginia Commonwealth University on two campus locations, and for schools, departments, and programs within each campus including the VCU Health System and six affiliated foundations. The program reaches alumni and friends of Virginia Commonwealth University throughout the state and nation and, increasingly, the world. More than 150 individuals have direct fundraising responsibilities, and many more provide direction or support, including academic leadership.

The central DAR office (CDAR) is responsible for providing the infrastructure and services that support fundraising. These activities and services require specialized professional training, offer efficiencies and economies of scale, require University-wide oversight, must be consistent across the institution, or are necessary for the university or foundations to fulfill their legal and fiduciary responsibilities.

CDAR is responsible for designing the overall strategy and process for university fundraising, building overall fundraising goals for VCU, campaign planning, fund raising for campus-wide and university-wide initiatives, setting university-wide performance metrics and evaluation metrics, and providing centralized services. CDAR coordinates a principal gifts program, managing high-level donors and prospective donors with multiple interests or who have interaction with the university top administration. CDAR also coordinates university-wide annual giving, regional engagement programs, and corporate and foundation fundraising. Infrastructure support services include gifts and records administration, stewardship, information technology, database management and access, reporting, prospect research, prospect management, alumni and donor communications, and event coordination.

Throughout VCU, there are 18 development programs located within units, such as schools, departments, programs, centers, and entities such as the cancer center and athletics. These decentralized development personnel report to deans or center directors. Traditionally, these entities employ 1 director of development with some administrative support, although several units employee 5-15 professional staff. All development personnel use DAR for development services, and approximately 200 currently have database licenses.

## **B. Alumni Relations and VCU Alumni**

As a unit of DAR, Alumni Relations is responsible for engaging alumni by providing services, developing opportunities for involvement in VCU activities, soliciting memberships, and recognizing achievement. VCU Alumni (VCUA) is a separate 501c3 organization that, as an alliance of constituent organizations manages all aspects of membership, organizes alumni in academic, geographic and shared interest constituent organizations. VCUA produces an alumni member magazine; sponsors alumni events to engage and honor VCU alumni; contracts with external vendors for additional services (such as credit cards, auto, home, life and health insurance); and oversees scholarships established by alumni chapters. VCU Alumni's assets are held on behalf of VCU. There are 16 employees in DAR dedicated to alumni engagement.

## **C. Affiliated Foundations**

VCU has six affiliated foundations (501c3) that hold assets on behalf of the University. The VCU Foundation holds assets primarily for units on the Monroe Park Campus and for VCU Athletics. The MCV Foundation holds assets primarily associated with Health Sciences campus, the Massey Cancer Center and the VCU Health System. The School of Business Foundation and the School of Engineering Foundation hold assets for their respective units. The VCU Real Estate Foundation holds real property assets across the university. The Intellectual Property Foundation manages patents and discovery interests for VCU.

## **Project Goals**

Virginia Commonwealth University has a large development staff and six affiliated foundations, creating an environment with complex accounting and gift processing requirements, relationship management, research, wealth identification, specialized reporting and analytics and other needs that are unique to alumni and development systems. A new DAR information system will replace a system which has been in place for 29 years. In moving DAR to a new system, this project has three main objectives:

### **A. Support all development functions**

The next generation DAR information system must support all alumni and development professionals throughout VCU and the VCU Health System and therefore must provide all of the infrastructure needs for our program while allowing end-users a user-intuitive set of tools to view prospects individually with full detail as well as support end-user reporting to generate lists, reports, thank you letters, etc. Systems for DAR professionals are created to allow for this level of sophistication and flexibility for large audiences with differing skill levels.

### **B. Robust and Secure**

The next generation DAR information system will enable VCU to acquire business intelligence about a broad set of constituents. One substantive goal of a new system is that it be robust enough to handle the needs of all development professionals and reduce or eliminate the need for shadow repositories of data. For those systems where absorbing the shadow data into the new application is not possible or not desired, the new system must have the capability of integrating or having data exchange with the other system. The next DAR information system must also provide the data and user security necessary to support fundraising at an academic medical center.

### **C. Sustainable**

The relationship between VCU and its constituencies last a lifetime - often relationships are built over sixty or more years from graduation to death. These are often very personalized 1:1 relationships rather than transactional/communications-based relationships. The current DAR information system (Sage Millennium / Abila) has served Virginia Commonwealth University since 1984 (29 years). If the next system has the same lifespan, it will support the fund raising efforts of Virginia Commonwealth University until 2043 or beyond. This timeframe will likely include several campaigns yielding multi-billion dollar results. DAR seeks a fundraising software application appropriate for our institution's size

and complexity. VCU seeks an application supplied by a stable and mature company with expertise, experience and understanding of higher education and medical center fundraising with industry best practices incorporated.

## **Statement of Needs**

This section provides a description of the characteristics, requirements and preferences for the next generation DAR information system at VCU. The selected solution will be a Constituent Relationship Management System (CRM) allowing consistent and comprehensive management of DAR data, web based connectivity, support for role based security, integrated e-commerce and communications, robust end-user tools, and data access needed for reporting and analysis.

This document does not describe the entirety of functionality sought by VCU to support Development and Alumni Relations. Those details will be identified during detail project requirement design or "discovery" sessions with the selected vendor.

### **A. REQUIRED FEATURES**

Of the design requirements, the following features are **essential required elements** of the next generation DAR information system. The CRM must include the following functionality:

1. Web based application, accessible on-campus and off-campus, not restricted by browser type, not requiring any installed plug-ins or other software, and capable of running on a Windows or Apple machine.
2. Role-based security controls access and permissions model, allowing permissions down to the field level.
3. Integration with the university's Active Directory (LDAP) and Jasig Central Authentication Service (CAS).
4. Ability to exchange data easily with other applications, such as Banner, Harris Connect, and Financial Edge.
5. E-communication functionality
6. E-commerce functionality
7. Easy, flexible data-mining and reporting capabilities
8. Ability to customize application to meet the university's needs without jeopardizing future application upgrades
9. Application programming tools.
10. Dashboard and analytical functionality
11. Responsive and comprehensive customer support. Customer support should be available 24 X 7 and 365 with first level user support available by telephone or Web, and second-level support for more technical problems.

### **B. DATA NEEDS**

The database must provide great flexibility in capturing and maintaining a large number of attributes about a constituent/donor/prospect. Intelligence must be built into the system to identify key "events" associated with the constituent to drive business decisions and investment of resources. There are many details about data attributes and characteristics needed to determine the overall adequacy of a given DAR information system. The following is not a comprehensive list of those attributes and characteristics; instead this provides a high level starting point in the discussion of the Data component.

#### **i. Data Entry and Maintenance - General**

1. Alerts and messages. The system shall have configurable alerts and messages that warn operators when some condition exists, such as invalid data that should not be used, so that operators can adjust the data they are entering.
2. Batch updates and loading utilities. The system shall have batch uploading utilities included that allow batch updates and loading to be done at the application level without additional



programming. The utilities should have options to back the data out and cancel jobs if a load fails.

3. The system must utilize role based permissions for data select, insert, edits and deletes. The system should be able to restrict data access based on criteria, e.g., only one unit can see details on an anonymous gift from a Dean; a major gifts strategy or proposal recorded by one departmental fund raiser should not be visible to other departments without permission.
4. Batch entry of gifts and biographical data must be available with default settings, control totals, and manual override. The system must support supervisor control of batches, such that batches must be reviewed and approved before they can be posted into the system.
5. Ability for quick repetitive data entry should be available. For example, 100 entities that need to have the same event attendance assigned or 100 payroll deduction pledges to a faculty/staff campaign.

## **ii. Biographical Data**

1. Must have the ability to accommodate multi-tiered academic information for alumni. Alumni are defined as degree holders. Required attributes include:
  - a. Major
  - b. Program within major
  - c. Concentration within major
  - d. Academic interest information. e.g. student receives an MBA from the evening MBA program with a concentration in Finance and has an interest in venture capital
  - e. Scholarships, honors, and other awards
2. Must have the ability to store and maintain alumni activity, affiliations, awards, constituent societies, chapters and membership including date fields for all.
3. Must have the ability to track academic medical center patient information compliant with HIPPA restrictions.
4. Must have the ability to track relationships for non-entities (where the person is not set up in the database). For example, we want to track the names of a donor's children but do not necessarily wish to set up all of the children in the database.
5. Must have the ability to track constituents' academic history, including but not limited to:
  - a. VCU and other university degrees
  - b. Graduation year
  - c. School or college attended
  - d. Preferred reunion year, if different from graduation year
  - e. Transfer student information
6. Must have the ability to track student interests and activities, scholarship recipients and awards and ability to link to parent data and every facet of the student relationship while at Virginia Commonwealth University.
  - a. Ability to import/leverage data from the athletic ticketing system, Paciolan.
  - b. Ability to import/leverage data from cancer center walk-a-thon system, Convio.
  - c. Ability to import data from other campus systems using Excel worksheets, csv file formats, or other industry standard formats.
7. Must have the ability to track constituent's career and employment history, and relationship to corporate and organizational records.
  - a. Ability to link to the employer record, with hyperlink to employer web site.
  - b. Accommodate job titles including an adequate job title field length for extremely long job titles.
  - c. Accommodate standard occupation and industry codes, e.g.DUNS, FEIN, etc.
  - d. Accommodate a relationship hierarchy for employer organization such as matching gift contacts, corporate agents and other relationships that might exist between individuals and organizations.
  - e. Ability to record and track an individual's related professional development, position changes, and other activities that reflect an individual's complete relationship with an organization.

- f. Ability to store multiple employers for a constituent with start and end dates. There should also be classifications for position levels in an organization and other employment attributes.
8. Must have the ability to code "deceased" constituent records
  - a. Ability to reverse erroneously "deceased" constituent records to living status
  - b. Automatically:
    - i. retire current affiliation relationships
    - ii. retire joint handling codes, e.g., joint mailing, joint salutations
    - iii. change honor roll names from joint to individual
    - iv. change related individuals' status, e.g., spouse becomes widowed, divorced, etc.
  - c. Ability to alert system users, based on DAR business rules, when records are "deceased".
  - d. Adaptations in functionality to "decease" corporate and organizational records.
9. Must have the ability to merge constituent records and, based on DAR business rules, automatically:
  - a. combine gifts and pledges including the handling of matching gifts
  - b. combine relationships
  - c. merge joint handling codes, e.g., joint mailing, joint salutations
  - d. merge related individuals' status, e.g., spouse becomes widowed, etc.
  - e. merge utility should be graphical and allow the online selection of information to be merged and what information should not be merged.
10. Must have the ability to handle all names, salutations, joint names through multiple name types, and multiple salutations based on DAR business rules.
  - a. Joint names should be automatically updated on both constituent records, determined by business rules, relationship codes or some other method in order to reduce errors.
  - b. Ability to overwrite salutation logic
  - c. Ability to store multiple name types such as names(s) whole enrolled and birth name
  - d. Ability to use multiple names from the same household if both are qualified for a given mailing.
  - e. Ability to sort husband/wife together on a list even though last names are different.
11. Must have the ability to handle multiple address types (including international constituents) such as home, business, preferred, seasonal and others.
  - a. Mailing preferences stored by address type. For example, send all my Athletic mail to my business, but send my other mail to my home.
  - b. Data entry staff should have the ability to change preferred address type codes without having to delete and re-enter an address.
  - c. Assign address to a region code based on zip code
12. Must have the ability to store
  - a. Gender code/description
  - b. Birth date (allow for partial date), birth source
  - c. Deceased date (allow for partial date), deceased source
  - d. Spouse ID, marital status and/or partner code
  - e. Ethnic code
  - f. Citizenship, Visa type
13. Must have duplicate checking. The system should have an algorithm that will check for duplicates when entity records are created and provide a warning to the data entry operator.
14. Must have the ability to code and restrict confidential, FERPA and HIPPA protected information to isolate access privileges between data entry and data inquiry.

### **iii. Fund Data**

1. Must have the ability to create fund records with
  - a. start/end dates
  - b. multiple associated general ledger chart fields
  - c. Foundation or bank account associated with the fund (where to deposit)

- d. Banner financial system account codes
  - e. fund purpose (multiple allowed)
  - f. fund type, e.g., current use, endowment, etc.
  - g. gift fee rules/formulae
  - h. campus organizations for distribution and reporting (e.g., department/program, division, school/college, administrative organization)
  - i. fund status, e.g., active, inactive, closed
  - j. administering organization
  - k. benefiting organization (multiple allowed)
  - l. distribution ratios for funds with multiple benefiting organizations
  - m. fund coding for inclusion in required reporting, e.g., to the Office of the President, CASE, CAE and other organizations
  - n. fields (text, numerical, dropdown tables) available for custom purposes
2. Must have the ability to link scanned documents related to the fund. VCU currently uses ImageNow for scanning and storing.
  3. Should have the ability to link associated funds, e.g., a donor may give to an endowment, then give to a current account to supplement the award until the endowment earnings are sufficient; or a current memorial fund may become an endowed fund when certain minimum criteria are met. If the current memorial fund is then deactivated, it would be useful to see a link to the endowed fund.
  4. Should have the ability to code funds to accommodate campus wide reporting needs such as classification of funds for capital projects and other similar elements requiring complex structures for cash flow reporting and management.

#### **iv. Tools and Services/Data Quality and Enrichment**

1. Must have the ability to integrate with various vendors to perform NCOA, CASS, lost alumni, and e-mail append screening services.
2. Must have the ability to receive updated zip code, county, city and state information from the USPS or equivalent service.
3. Must have the ability for area code update services (area codes added/split, etc.)
4. Must have the ability to keep transactions static after posting; should create reversing transaction adjustments not change original.
5. Must have the ability to save email into the application as contact history from Google Mail and from mobile devices.
6. Must have the ability to import gift data securely from third parties. We currently import data from Harris Connect, WorldPay / Authorize.net (online giving), Convio, and Suntrust Bank (deposits).
7. Should have the ability to integrate wealth screening web tools and data from leading vendors such as Wealth Engine
8. Should have the ability to interface with direct mail vendors.
9. Should have the ability to automatically generate alerts based on business rules (example: notify Development Officer when a pledge is about to be written off).
10. Should have the ability to see who made any given edit, what changed on the record, etc.
11. Should have the ability to send pledge and membership reminders through email
12. Should have the ability to interface with corporate gift matching policy update services such as HEP and CASE.
13. Should have the ability to interface with commonly used planned giving software, such as PG CALC.

#### **v. Data Manipulation**

1. Must include flexible tools to load new records into the system or to append or modify data on existing records.
2. Must include tools to merge duplicate records.

3. Data manipulation tools should, at the discretion of the user, automatically apply the business rules of the application to imported data.
4. Should log the activity and use of its data manipulation tools.
5. Should include tools to take snapshots of transactional data, and has the ability to schedule the snapshots.
6. Should include tools for building and/or supporting a reporting data mart.
7. Should be able to perform incremental builds of data marts based on changes in the database.
8. Data mart tool should be able to automatically apply the business rules of the application to summarize exported data.

#### **vi. Data Interfacing and Reconciliation**

1. Must include flexible tools to load new records into the system or to append or modify data onto existing records.
2. Must record either debits and credits or positive/negative transactions. No absolute value.
3. Must not allow backdating of post date information. Application must not change dates of prior activity based on current activity.
4. Data manipulation tools should be able to automatically apply the business rules of the application to imported data.
5. Should log the activity and use of its data manipulation tools.
6. Should include tools to take snapshots of transactional data that can be recreated at any time.
7. Interfacing
  - a. Account numbers on system must be able to correlate with account numbers in five affiliated foundations (dissimilar numbering methods)
  - b. Application must be able to locate constituent using ID numbers stored from multiple other systems such as the student system, athletics ticketing system, and VCUHS Cerner patient information system.
  - c. Application should be able to exchange data with hosted applications such as Convio and Harris Connect.
8. Should be able to interface with social media sites such as LinkedIn.
9. Reconciliation
  - a. Must be able to reconcile On-line giving credit card confirmation number with gift record and with payment gateway records
  - b. Should be able to easily reconcile subsidiary ledger (cash receipts/pledges) to general ledger.

#### **vii. Organization Data**

1. Must have the ability to link all parts of an organization, including corporate headquarters, parent company, subsidiaries, regional branch offices, divisions, holding companies, and corporate foundations.
2. Must have the ability to track point of contact within organization without having to create separate record.
3. Must have the ability to pull linked organizations into one comprehensive report to see entire corporate relationship with VCU.
  - a. Ability to track executives and their personal giving record along with corporate history and giving record.
  - b. Ability to track all corporate volunteer information along with total personal and organizational giving history.
  - c. Ability to track available alumni and parent employment information.
  - d. Ability to track named funds, spaces, programs from any sector of the corporation past or present version.
  - e. Ability to track merger or defunct dates of corporation.
2. Must have the ability to track foundations by type, e.g. independent, family, donor advised fund or corporate.
3. Must have the ability to track the following types of corporate data:

- i. Procurement
  - ii. Grants and contracts
  - iii. Sponsorships
  - iv. College/center/faculty interactions
  - v. Research/patent linkages
  - vi. Recruiting, Internships/cooperative education
  - vii. Matching gifts
  - viii. Advisory Boards and Special Affiliations
  - ix. Facilities/equipment
  - x. Job placement of VCU graduates
- 4. Must have the ability to generate a "tree view" of corporate data
- 5. Should have the ability to see historical view of an organization before a merger, example: legally gave \$100,000 as Company 123 merged to Company XYZ.
- 6. Should have a matching gift screen that can link to vendor that provides corporate matching gift information updates (restrictions, limits, and rules).
- 7. Should have the ability to track SIC identification code for type of corporation, taking into consideration that some corporations have multiple codes.

## **C. OPERATIONAL NEEDS**

### **i. Gift Administration**

1. Must have the ability to manage varied degrees of anonymous gifts:
  - a. Completely unknown donors
  - b. Known donors who want their gift to be completely confidential beyond the required gift acceptance staff involvement
  - c. Known donors who want limited confidentiality, e.g., a faculty member who doesn't want his department to know that he is the donor to their laboratory facility
  - d. Known donors who do not mind that that campus knows, but who do not want public acknowledgment, e.g., honor rolls, etc.
2. Must have the ability to manage multiple, complex pledges:
  - a. If a donor has one or more open pledges, the open pledges are displayed during gift entry
  - b. Ability to enter and track a conditional pledge with special circumstances.
  - c. Ability to suppress conditional pledges from reporting
  - d. Ability to enter an editable pledge payment schedule based on payment frequency and date criteria
  - e. Pledge split to multiple accounts
  - f. Ability to adjust pledge amount or payment schedule without deleting entire pledge payment history, e.g., cancelled or written-off pledges, while maintaining an audit trail and allow options for manual adjustment option for single record or batch adjustment option to reverse pledge entries by date
  - g. Ability to reinstate a written off pledge should the donor decide to make payments
3. Must have the ability to generate pledge reminders (paper and email) on schedule requested by donors such as monthly, quarterly, annually, irregular and also manual reminders. Ability to record in system when the reminder was sent, method (email, USPS), and to what address.
4. Must have the ability to generate receipts for gifts
  - a. Receipts can reflect and distinguish between tax deductible contributions and nondeductible benefits
  - b. System can generate a single receipt for a gift with multiple designations detailed
  - c. Receipts can be generated by gift batch
  - d. Receipts can be generated manually for a specific transaction
  - e. Receipts can be scheduled on an annual basis. For example a donor who makes monthly payments (such as payroll deduction) should be able to choose an annual receipt.

- f. Receipts should have the ability to have descriptive data added where appropriate, such as the description of a gift in kind, possibly an appraiser, and details of stock shares received or other information.
  - g. Receipt format may be customizable to allow for central production of receipts for multiple foundations, branded for multiple units with the "look and feel" of the unit
  - h. Receipts should also be able to be selected by a media type based on donor preferences. For example a donor may wish to receive an e-receipt only.
5. Must have the ability to handle centrally processed gifts with a decentralized acknowledgment strategy:
  - a. Acknowledgement letters can be assigned during gift entry
  - b. Acknowledgment letters can be produced in a single batch as opposed to running a separate batch for each type of letter.
  - c. System can accommodate business rules to calculate appropriate acknowledgement letters based on a variety of fields, such as gift amount, designation, donor status, etc. A manual override feature must be available.
  - d. Acknowledgement letters are personalized via mail merge from the database
  - e. Record of the acknowledgement letter is recorded in the database, linked to the appropriate transaction and can be linked to a scanned image of the letter
6. Must have the ability to generate preformatted Voluntary Support of Education report that complies with CASE standards.
7. Must have the ability to produce FASB compliant reports.
8. Must have the ability to handle athletics related gifts and benefits such as preferred seating.
9. Must have the ability to handle gifts and premiums in one transaction and split the amounts between different funds or allocations.
10. Must have the ability to handle multiple variations of legal and soft credit.
11. Must have the ability to manage recurring gifts and pledge payments through automatic billing of credit cards (encrypted) or interfacing with a credit card vendor.
12. Must have the ability to enter gifts in batches that correlate to bank deposits.
13. Must have flexible tender type codes that can be added to and modified for different gift types.
14. Must have adequate descriptive blocks for elements such as gift in-kind descriptions. The ability to record appraiser of a gift in-kind and other information.
15. Must have the ability to record all information on securities and gifts of real property.
16. Must have the ability to attach all related documents to the gift, such as donor correspondence, gift agreements and other relevant information.
17. Must have the ability to monitor open gift batches to determine batch turn-around time. Ability to report on batch workflow and offer features such as placing a batch on hold for issue resolution, or marking with attributes meaningful to the processing team.
18. Must have the ability to record non-gift transactions, such as event revenue, separate from gifts on the donor record.
19. Should have the ability to calculate gift fee based on fee administration rules for each transaction with an audit trail
20. Should have the ability to set up discount rates for pledges in order to determine the amount of write-offs.
21. Should have the ability to record and keep track of sponsored research grants and report separately from gifts.
22. Should have the ability to track matching grants, e.g when a donor's gift is matched with an internal fund account.

## **ii. Document Management**

1. Must have the ability to link imaged documents directly to the appropriate constituent record.
2. Should have the ability to upload and link images in batches, e.g., gift documentation, donor stewardship reports, acknowledgement letters, etc., with the appropriate record within a table. Example: An image of the donor check and annual fund response piece is linked to the associated gift record.

3. Should (strong preference) have the ability to utilize VCU's document imaging system, ImageNow. <http://www.perceptivesoftware.com/>

### **iii. Non-cash Gifts**

1. Planned Giving. Must have the ability to record information necessary for the appropriate reporting of common planned giving instruments such as revocable requests, trusts, and charitable gift annuities, such as present value and face value.
2. Must have the ability to record gifts of life insurance, and the associated fields such as cash surrender value, proceeds, premium payments, and termination amount.
3. Must have the ability to record pledges
  - a. Ability to attach scanned donor agreements.
  - b. Ability to schedule pledge payments at any frequency.
  - c. Ability to reduce the amount pledged.
  - d. Ability to split a pledge over multiple funds.
  - e. Ability to share a pledge with multiple unrelated constituents.
  - f. Ability to give campaign credit for a pledge to another constituent.
  - g. Ability for one constituent to make payments on another constituent's pledge.
  - h. Ability to monitor past due pledges.
4. Must have the ability to record all non-cash gifts, such as real estate, art, equipment, licenses, and other forms of gifts-in-kind.

### **iv. Prospect Management**

Prospect Management is a vital component of a DAR information system. There needs to be adequate functionality to allow the identification of prospects in different categories and states of cultivation, as well as the ability to do complex assignments of prospects to Development Officers, Deans, executive leadership, and volunteers.

1. Must have the ability to provide automated ticklers for upcoming tasks and actions. Alerts can be shown at database login, sent via email, or merged into Google Mail or a mobile device based on user preferences.
2. Should have the ability to provide graphic dashboard of key indicators, such as totals by campaign, appeal, or donor segment at login and based on role.
3. Must have the ability to track and report on multiple solicitations for a prospect including such information as:
  - a. Solicitation/proposal ask amounts
  - b. Start/end dates
  - c. Stages with donors
  - d. Status
  - e. Campaign
  - f. Staff and volunteer assignments
  - g. Segmentation (e.g., major gift, annual fund, principal gift, etc.)
  - h. Solicitation method
  - i. Purpose
  - j. Approval
  - k. Outcomes (funded or rejected)
  - l. Comments, etc.
  - m. Contact types/ purposes
4. Proposals must have the following:
  - a. Ability to track portfolios by development officer and by unit.
  - b. Ability to view/track multiple proposals for the prospect from the various departments/units on campus
  - c. Ability to link contact report to the proposal.
  - d. Ability to link a solicitation/strategy to another prospect's record.

- e. Ability to track households and reciprocally update contacts so they are automatically applied to a joint-constituent's record and can be overridden if needed.
- f. Ability to assign multiple solicitors to a prospect. Ability to maintain a history of solicitor/prospect assignments with start and end dates. Ability to designate a primary manager/solicitor and multiple secondary solicitors for any prospect, including staff and volunteers.
- g. Ability to maintain areas of potential funding interest or primary funding interest of a company or foundation.
- h. Ability to load a wide variety of wealth indicators that can be used as part of developing an individual's comprehensive wealth and attitudinal profile.
- i. Proposal management capabilities such as proposal amounts, and expected future amounts, proposal status and timeline tracking, proposal history and all other aspects of proposals in order to manage the pipeline and cashflow projection.

## **v. Prospect Research**

1. Must have the ability to store miscellaneous important attributes about a constituent, including
  - a. Biographic information
  - b. Asset information
  - c. Personal interests
  - d. Post graduate affiliations
  - e. Familial and other relationships
2. Must have the ability to link documents, pictures, items to constituent record
3. Must have the ability to track various prospect ratings and their source (staff, electronic screening, peer, university or unit defined).
4. Should have the ability to generate custom entity profiles without having to re-format in another program. The profile report would allow users to select which elements they wanted to see, click on run, and have the report delivered immediately.
5. Should be able to generate profiles for individuals or groups of prospects.

## **vi. Annual Fund/Communications**

1. Must have the ability to target appeals and analyze results based on flexible combinations of criteria such as:
  - a. Recency and Frequency, e.g., calendar year, fiscal year, first gift date, most recent gift date, years of consecutive giving, year-to-year results comparisons.
  - b. Giving Level, e.g., highest previous contribution, current giving club level, most recent gift amount, lifetime giving total.
  - c. Constituency, e.g., campaign, package, segment, affiliation with school, college or organization, donor status, i.e., current or prior donations to the fund associated with the appeal
2. Appeal/solicitation totals should automatically accumulate as gift batches are posted so totals are available in as close to "real-time" as possible.
3. Appeal information should also include information such as number of pieces, cost, date sent and other identifiable attributes.
4. Should have the ability to attach images, documents and other elements that made up the actual physical media that was distributed.
5. Must have the ability to send mailings to couples that can be joint, separate, same address and/or different addresses with ability to maintain information. Ability to properly customize and merge titles (e.g., Dr. & Dr. or Dr. & Mr.). Ability to have flexible salutation sets ( e.g., Presidential salutations, VP salutations)
6. Must have the ability to flag address fields (including street, email or phone) "preferred"
  - a. Ability to maintain multiple preferences related to each address category, e.g. home address(es), business address(es) , seasonal home



- b. Ability to maintain multiple mailing preferences for one constituent to accommodate different campus organizations, e.g., one organization mails to the home address, while another has been asked to send mail or call at the business address.
- 7. Should have the ability to select output, ask amounts, designations and other fields based on if-then statements within the query.
- 8. Application should have pre-defined segments and impromptu segments.
- 9. Must have the ability to maintain a history of communications activities including dates and types of correspondence sent, e.g., direct mail, broadcast email, personal contact, events, newsletters, donor reports, phoning campaigns, etc. Should have the ability to show in one screen which appeals a constituent has received, e.g., anyone or combination of annual fund-direct mail, telemarketing, major gift proposal, planned giving, etc.
- 10. Donor and prospect preference selections are key to maintaining successful touch point relationships with constituent groups. Application must have opt-out and opt-in capabilities, with date ranges, media types, and be able to be broken down by individual campus units. For example, a donor may wish to receive an invitation for events from one school, university wide magazine in PDF format, and no phone calls for solicitation purposes after 6 p.m. at night.

## **vii. Donor Stewardship**

- 1. Must have the ability to maintain donor reporting requirements
- 2. Must have the ability to generate reports and lists on schedule requested by donor (monthly, quarterly, annually, irregular), with manual override.
- 3. Must have the ability to produce honor rolls based on multiple sets of criteria (e.g., campus wide giving, unit/department giving, campaign giving, etc.).
- 4. Must have the ability to maintain information on scholarship and endowment accounts, such that all documentation regarding the account is available, and donors who should be stewarded are linked to the accounts. Examples of use for this data model include the production of donor endowment reports, and tracking of stewardship activities between scholarship donors and the students who receive the scholarship.

## **viii. Gift Planning**

- 1. Must have the ability to track required information on a variety of planned gifts (bequests, annuities, life estates, pooled income funds, and trusts), including:
  - a. Executor or trustee
  - b. Trust name
  - c. Status
  - d. Other beneficiaries
  - e. Market/estimated/actual values
  - f. Estimated/actual maturity
  - g. Comments
  - h. Revocability
  - i. Valuation dates, each with market value, future value, and source
  - j. Projected payout information
  - k. Professional Contact (without creating a new record and relationship)
- 2. Must have the ability to view the planned gifts a constituent has committed to the institution which may include multiple gifts of varying types.
- 3. Should have the ability to calculate net present value and other discounted amounts for planned gifts.
- 4. Must have the ability to correct for payments that are less than or more than original gift.
- 5. Must have the ability to track a contact person for the bequest (e.g. accountant or attorney) without having to create a database record for the contact.

## **ix. Campaign Management**

- 1. Must have the ability to create and manage multiple, overlapping campaign structures with

- a. Fundraising goals and progress toward those goals daily, monthly, annually
  - b. Starting and ending dates
2. Must have the ability to make multiple assignments to campaigns:
  - a. Multiple departments or units
  - b. Multiple staff members
  - c. Multiple volunteers solicitors
  - d. Multiple prospects to be solicited
3. Must have the ability to report on goals and achievements by
  - a. Campaign
  - b. Department or unit
  - c. Funds
  - d. Staff assigned
  - e. Volunteer solicitors
  - f. Prospect pool, household
  - g. Date range
4. Must have the ability to comply with Council for Advancement and Support of Education (CASE) management and reporting standards.
5. Must provide flexibility in determining what gifts, pledges and planned gifts count toward the campaign and what campaign priority they should count toward.
6. Must have the ability to deactivate and archive campaigns when necessary
7. Must have the ability to track hard and soft credit, pledges/payments and matching gifts, and recognition credit across units.
8. Must have a graphic dashboard tool to track campaign progress.

#### **x. Volunteer Management**

1. Must have the ability to understand and track relationships between volunteers and other constituents, e.g.,
  - a. Volunteer solicitors and prospective donors
  - b. Cub/chapter volunteers and associated constituent group
  - c. Volunteer speaker/expert and faculty or organization with whom they have a relationship
2. Must have the ability to record volunteer roles, e.g., President of VCU Alumni, Chair of the School of Business Advisory Council, Leader of the VCU DC Alumni Chapter
3. Must have the ability to track start and end date of volunteer term.
4. Must have the ability to track volunteer involvement in solicitations and prospect assignments, with the same reporting tools as development officer proposal tracking.

#### **xi. Event Management**

1. Must have the ability to segment invitees for events and communications based on miscellaneous biographic criteria e.g., interest, past participation, giving levels, region.
2. Must have the ability to track event history, including date, location, hostess, speakers, invitees, attendees, guests, and follow-up.
3. Must have the ability to support online registration, confirmation and payment options.
4. Must have the ability to manage events where registration includes selection of multiple activities occurring during the event.
5. Reporting, Letters and other outputs
  - a. Must have the ability to view who will be attending
  - b. Should have a tool to produce satisfaction surveys after an event
  - c. Must have the ability to track seating chart, assignments, and special seating accommodations
  - d. Should be able to generate name tags from attendance listing
6. Application functionality that tracks attendees, spouses and guests should includes flexible ways to group or categorize participants and track RSVPs
7. Must have the ability to record special requirements (i.e. dietary or other accommodations)

## **xii. Membership Management**

1. Must have the ability to maintain detailed information about member status, renewal schedules, and premium qualification, such as:
  - a. Type of membership, and option for the system to automatically calculate this field based on business rules for dues received (e.g. lifetime member, annual member, members who join at a special rate)
  - b. Start and expiration dates of membership
  - c. Multiyear and life memberships.
  - d. Sponsored memberships - who paid for the membership and others included in membership for targeted renewal (e.g. parents paying for child, company paying for employees, dean sponsoring new graduates for first year)
  - e. Joint and single memberships
  - f. Membership splits or transfers (deaths or divorces)
  - g. Multi-tiered affiliation model with one primary affiliation and multiple additional affiliations (e.g. Alumni primary to VCUA, affiliation with School of Education, Soccer, and Atlanta Area Chapter), and should have the ability to track historical changes to affiliations
2. Must have the ability to support special alumni programs
  - a. Young Alumni
  - b. Distinguished Alumni Awards
  - c. Homecoming
  - d. Member Appreciation
  - e. School based alumni events
3. Must have the ability to track premiums that result from levels of membership, with ability to apply business rules for automatic assignment of the premium items and incorporate this information into fulfillment reporting.
4. Membership renewals
  - a. Must have the ability to determine and generate renewal lists based on business rules
  - b. Must have the ability to produce personalized renewal notices
  - c. Must have the ability to target and provide special offers or campaigns to groups matching specific criteria, e.g., offer special renewal rate for annual members who renew for three years at once, special offer to first year alumni, etc.
5. Membership Dues
  - a. Must have the ability to record membership dues, non-deductible premiums associated with dues, and charitable contributions in the same screen without double entry to record gifts
  - b. Must have the ability to offer credit card and EFT/ACH payment options and refunds
  - c. Must have the ability to generate receipts/acknowledgements/letters

## **D. TECHNOLOGY**

### **i. Technical Environment**

1. If vendor proposes a hosted, Web-based, Software as a Service (SaaS) solution:
  - a. All hardware and software required for the solution must be housed in a secure site and vendor must provide a SAS 70 style security report from a third-party reviewer
  - b. Solution must include the services required for installation, integration, testing, and maintenance
  - c. Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data
  - d. Solution must provide at minimum daily backups of VCU data with restoration capability to point-in-time or current as required by VCU
  - e. Solution must run on redundant servers with failover capability

- f. Solution must be monitored by the vendor 24X7 with any outages reported to VCU upon discovery
  - g. Solution must provide Web-based remote and mobile access to all members of VCU community using any industry standard device and browser combination
  - h. Solution must integrate with existing VCU systems and data without requiring additional middleware or custom coding
  - i. Solution must provide dashboards and visual displays of information, as well as the capability for VCU to rapidly develop custom and ad-hoc reports, preferably using VCU's Enterprise Business Intelligence Suite reporting tool
  - j. Solution must provide administrator-level security access suitable to monitor and manage VCU users, data, workflow, and internal processes
  - k. System outages for maintenance must not be scheduled during normal working hours (Monday – Friday, 8 am – 8 pm, EST)
  - l. Solution must provide scalability and adaptability to changing business needs. Customization methodology must be specified.
  - m. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR user access, should describe how users authenticate to the system and how they can retrieve ID/password when they forget them
  - n. Vendor must detail the Total Cost of Ownership (TCO) over three, five, and ten year periods.
2. If vendor proposes a VCU-hosted solution
- a. Solution must conform to VCU's architectural standards for operating system, database, server platforms, and user authentication
  - b. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR users should describe how users authenticate to the system and how they can retrieve ID/password when they forget them
  - c. Solution should be capable of running in a virtual server environment
  - d. Solution must provide VCU the capability to install, integrate the CRM with existing systems and data, and manage end-users and data
  - e. Response time must not exceed 5 seconds on average to load any system form or display on VCU's main network (10 Gb/sec)
  - f. Vendor must identify the IT skill-sets required to support the solution
  - g. Solution must provide VCU the scalability, adaptability, and customization ability needed to match evolving business needs and processes. Customization capabilities must be robust and flexible.
  - h. Solution must provide Web-based remote and mobile access to all members of VCU community using any industry standard device and browser combination
  - i. Solution must be Web-based and provide access via any using any industry standard device and browser combination
  - j. Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data
  - k. Solution must provide VCU-configurable dashboards and visual displays of VCU CRM information, as well as the capability for VCU to rapidly develop custom and ad-hoc reports.
  - l. Solution must include the services required for installation, integration, testing, and maintenance
  - m. Vendor must detail the Total Cost of Ownership over three, five, and ten year periods.
3. If vendor proposes a 'hybrid' solution,
- a. Solution must provide subscription-based licensing
  - b. Solution must be a single-tenancy architecture where applications, databases, servers and memory, storage and backups are not shared with multiple tenants
  - c. Solution should provide the convenience and cost-efficiency of a SaaS (software as a service)-based CRM application with the robustness and broad customization functionality of an on-premise CRM system.
  - d. Solution must include the services required for installation, integration, testing, and maintenance

- e. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR users, should describe how prospective students/parents authenticate to the system and how they can retrieve ID/password when they forget them
- f. Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data
- g. Solution must provide minimum daily backups of VCU data with restoration capability to point-in-time or current as required by VCU
- h. Solution must run on redundant servers with failover capability

## **ii. Security**

- 1. Must have the ability to encrypt all communications and transmissions between servers, and between servers and clients.
- 2. Must have the ability to provide both row and field level security.
- 3. Must have been audited and certified by an independent security consulting firm.
- 4. Must have the ability to encrypt specific data elements, such date of birth or medical related data.
- 5. Must have the ability to decrypt encrypted data elements restricted to selected users.
- 6. Must be compatible with Virtual Private Network (VPN) technology.
- 7. Must have the ability for third party tools (example: Crystal Reports) to access the database and make use of the security rules configured in the application.
- 8. Security groups must apply to all parts of the Application, including any built-in reporting and data extraction tools.
- 9. Software must be certified by a third-party security certification process or audit.
- 10. Company must have a published policy on the remediation of published vulnerabilities and a policy on re-validating products when updates are released.

## **iii. Authentication**

- 1. Must integrate with Active Directory (LDAP) and Jasig Central Authentication Service (CAS).
- 2. Must have the ability to internally maintain the identity of all active users and as necessary be able to link defined security-relevant actions to specific users.
- 3. Must be capable of supporting organization password policies, including length, complexity, and lifetime. Application must be able to use the VCU university login (Eid), and have the option to also create "local" users who do not have a university login.
- 4. Must provide for easy definition and editing of access control rules, and of user/group permissions/accounts by role.
- 5. Must support remote administration
- 6. Must have the ability to automatically import user account information from existing directories (ADS Group), and to identify LDAP as the source of the information at the time of import into the application.
- 7. Must have the ability to interoperate with security domains and databases on other systems. (ADS/LDAP)
- 8. Must have the ability to log the activity and use of its data manipulation tools.
- 9. Must have role-based security.

## **iv. Application Administration**

- 1. Must have the ability to support multiple client operating systems : Microsoft Windows 7 and higher, and Apple Macintosh 10.2 and higher.
- 2. Must be implemented as a web application.
- 3. Must not require a browser plug-in, desktop client software, or administrative rights to run. Provide a comprehensive list of web browsers and mobile browsers supported by the application, as well as support plans for future browser updates.
- 4. Must have a web interface or GUI for all aspects of application administration, including user account management, software updates, and application configuration.

5. Must have the ability to allow administrative operations to be executed in batch form (example: modify the attributes of a set of users).
6. Must be able to create and add custom tables to the system, and deploy information on fields from these tables onto system screens.
7. Must be able to create custom validation rules for the system without requiring custom programming.
8. Custom validation rules or tables created in the system must not jeopardize the successful installation of regular updates or patches from the vendor.
9. Must have the ability to lock out users in some or all security groups in order to perform system maintenance.
10. Application email component must integrate with VCU email. VCU uses Google Apps for Education.
11. Quick data entry screens should be available and it should be easy for internal staff to develop these screens with back-end validations.
12. Should have the ability for application jobs (examples: reports, extracts, data loads) to be scheduled for unattended operation.
13. Should be able to configure the screens within the system such as renaming of the fields, allowing only certain blocks of data to be seen, screen colors, logos and everything else that is required to "brand" the user experience in the system to the University.
14. Should be able to turn on and off full audit capabilities on all tables in the system, which should store a complete before and after picture of a record.

#### **v. Customization and Configuration**

1. Must have the ability to be configured and customized for DAR's specific needs.
2. Should have the ability to add a new data element to the application/database.
3. Should have the ability to tie the new element to an existing dataset.
4. New data elements should be editable and viewable by end-users on an application form.
5. Should have the ability to define and limit the allowable data values for the new data element.
6. Should have the ability for application data manipulation and conversion tools to populate the new data element.
7. Should have the ability to secure this new data element throughout your application.
8. Should have the ability to customize the business logic within the application.
9. Should have the ability to maintain these customizations through application patches and upgrades.
10. Should have the ability to migrate between instances (example: from test to production).

#### **vi. Software Maintenance and Support**

1. Must have annual and multi-year software support available.
2. Must provide software support for all software, including any bundled technology.
3. Software support must include
  - a. Error Corrections
  - b. All Updates made available to licensees of the Software
  - c. Any Upgrades made available to licensees of the Software without an additional license fee
  - d. Technical assistance on the installation, use, performance tuning, maintenance, and repair of the Software.
4. After each major new release of the application, software support must be provided for the prior version of the application for a minimum of one year.
5. Software support must be available for the Operating Platform (or its future versions) and database (or its future versions) initially selected by VCU for a period of five (5) years from the initial date of Production Use, provided that VCU continues to operate the Software on that Operating Platform.
6. Must provide prompt response to contacts from DAR's authorized personnel.

7. Must provide prompt referral of usage questions, reported Errors, and other inquiries to Vendor personnel who have a level of experience and skill sufficient to provide prompt and accurate responses.
8. Must provide prompt and diligent efforts to provide information or Error Corrections in response to DAR reports and inquiries, according to the severity of the problem.
9. The application and Software Development Kit should be compatible with new versions of development software (Visual Studio, .NET) within one year of their release.
10. Service days should be Monday through Friday, and service hours should be 8-5 EST at a minimum (prefer 24/7 support), with online and telephone availability.

## **E. REPORTING AND SELF SERVICE FUNCTIONS**

### **i. Online Services**

1. Must provide secure environment for credit card processing that is PCI and NACHA compliant, or the ability to interface with a secure credit card processing vendor
2. Should provide an online giving portal through which constituents can
  - a. Make a secure credit card gift
  - b. Choose from a menu of giving options (multiple funds)
  - c. Complete the transaction through secure web forms
  - d. Receive an emailed acknowledgment of their gift
  - e. Make a pledge, and schedule recurring pledge payments
2. Credit card processing should integrate with automated batch processing of online gifts
3. Should have the ability to support an online community in which users are able to find and contact one another, as well as support multiple permission levels in the alumni online community (e.g. public, registered user, paid member, lifetime member).
4. Should have the ability to provide online, self-service profile module to
  - a. Allow alumni and donors to submit address changes
  - b. Allow alumni and donors to provide information about employment, relationships, e.g., marriages, etc.
  - c. Allow alumni to check their records and membership status
  - d. Allow alumni to update their membership affiliations and subscription preferences
  - e. Allow alumni to view donation and membership history
  - f. Allow alumni to submit class notes, etc.
  - g. Ability to integrate the self service functions into the alumni online community
  - h. Manage subscription and communication options
  - i. Utilize the system to mass email using segments and targeting specific groups without requiring additional programming.
5. Should support online event registration with secure credit card payments.
  - a. Ability to create multiple fee types and tabulate ticket prices.
  - b. Ability to combine event payment with a gift
  - c. Ability to store benefit information (t-shirt, etc)
  - d. Ability to link to main database for registrant preference attributes (dietary restrictions, etc)
  - e. Ability to store RSVP information
  - f. Ability to have event rules that would trigger actions, such as alert when prospect registers for an event
6. Should provide the ability to send staff alerts based on business rules that will notify them of online activity such as making a gift, registering for an event, updating personal information
7. Should include a Content Management Service. One of the keys to online services is the ability of the system to include a robust integrated content management system that allows elements used in the system to be easily deployed on web pages such as an events listing, display of an events calendar and other elements included in alumni community software.
8. Should have the ability for information updated online to be subject to review and editing by records management staff prior to posting into the database.
9. Should support social media functions such as blogs.

10. Must support the use of automation devices such as bar code readers.
11. Should allow users to create macros for repeated data entry function.

## **ii. Reporting and Authoring Tools**

1. All application data elements must be available to the reporting tool.
2. Must provide the ability for reporting tools to be integrated with the application
3. Must have availability of online help functionality.
4. Must have the ability for end-users to construct and execute a query.
5. Must have the ability for a user to group records within a report and sort the resulting groups.
6. Must have ability to download lists/reports into common applications such as Word, Excel, etc.
7. Must have the ability to save queries for later usage and/or further validation by reporting staff
8. Should have the ability to hide the details within the groups and drill down from a group summary report into a detail report.
9. Should include pre-built reporting views.
10. Should have the ability to integrate dashboards and other graphical indicators directly into the screens without the need for custom programming.
11. Should allow end-users to perform segmentation and solicitation queries without the assistance of a programmer.
12. Should have the ability for end-users to query any data element in the Application through the query tool.
13. Data elements should be described and documented for end-users through the query tool.

## **F. GENERAL**

### **i. Vendor Implementation Support**

1. Vendor must be able to provide assistance in determining which DAR business processes should be modified to conform to the software best practices and which should be supported through customizations or interface development.
2. Vendor must be able to provide assistance to our technical team in developing business rules and applying them to the software.
3. Vendor must be able to provide assistance with testing the hardware and software prior to delivery and during installation.
4. Vendor must be able to provide assistance converting legacy data to the new system, including the mapping of table data.
5. Vendor must be able to provide assistance with data cleansing required prior to conversion.
6. Vendor must be able to provide guidance regarding the conversion of existing interfaces to work with the new system.
7. Vendor must be able to provide training during and after the implementation.
8. Vendor should be able to provide online training resources.
9. Vendor should assist VCU with the migration/conversion of data in Millennium to the new system.

### **ii. Vendor Requirements**

1. Vendor must be able to ensure confidentiality of VCU and affiliated foundation owned data.
2. Vendor should have implementation staff located in the Richmond, VA region.
3. Vendor should be able to provide onsite vendor support throughout project including but not limited to project management, technical and training.

### **iii. General System Requirements**

1. Must have a demonstrated ability to support 1,000,000 or more active constituent records while providing acceptable response time in all areas of the application. VCU database currently holds 300,000 active constituent records.



2. Software should be installed and in use at similar organizations (public research university with academic medical center) with comparable DAR and IT staffing, and who may be either working on, or have completed, campaigns in excess of \$1 billion.
3. The system should support workflow management and automation. For example, when a prospect is cleared, when a gift is processed, there should be configurable notifications that can be automatically sent to update a gift officer or other staff as to the activity that has taken place.
4. System lookups should allow the use of wildcard characters.
5. Vendor should provide a strong user community, with annual conferences and regular training opportunities.
6. Vendor should have a product roadmap and be able to share plans and vision for future product development and enhancements.
7. System should have configurable messages that display when a user logs in, so that relevant system administration messages can be deployed to all users, or groups of users to convey key information.
8. Wherever possible, the system should have hyperlinks to navigate between relevant pieces of information. For example, if you click on the spouse name in a record you should be taken to the equivalent spouse screen.

### **Essential Procurement Needs**

- A. Freight terms shall be F.O.B. Destination/Prepaid with inside delivery; additional charges shall not be allowed.
- B. The terms and conditions of the RFP govern the resulting contract and not the Contractor terms and conditions or license agreement.

***Firm should submit detailed information about what services your company is proposing to provide for the products and services described above. The words shall or must indicate mandatory requirements and the words should or may indicate non-mandatory requirements. Please clearly indicate that your firm is agreeing to comply with all of the mandatory requirements and clearly state which of the non-mandatory requirements are offered.***

### **Experience and Qualifications of Firm:**

***Firm should provide:***

- A. ***Describe the experience and qualifications of your firm to provide the required services.***
- B. ***Provide information about the experience and qualifications of the personnel proposed to work on the project with VCU. Why does this experience and qualifications make them the best choice for this project?***
- C. ***List of three references for whom similar services were provided, preferably of public institutions of higher education or a similar sized organization.***
- D. ***Provide a list of institutions of higher education with which the firm has a signed term contract.***
- E. ***Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of VASCUPP Members can be found at <http://procurement.vcu.edu/our-services/university-purchasing/vascupp/>.***

### **Other related goods/services:**

***Describe other products and/or services provided by your firm that may be utilized by VCU. Explain how the fee schedule would be established for these products / services during the contract term (or submit the fee schedule) and your firm's ability to provide most favored nations pricing. Also, explain how VCU would be notified of newly introduced products / services.***

**Sustainability:**

*Provide information to demonstrate the overall environmental impact of your proposed approach. Include information on your recommendations to reduce the environmental impact and create efficiencies.*

**Small, Women-Owned and Minority-Owned Business Commitment:**

*Firm must submit complete Appendix I which is available at [http://procurement.vcu.edu/files/RFP Website Link Appendix 1.pdf](http://procurement.vcu.edu/files/RFP_Website_Link_Appendix_1.pdf) unless the firm is a DMBE certified small business. DMBE certified small businesses must include their certification number on the coversheet of this RFP, but are not required to complete Appendix I.*

**Invoicing and Payment:**

*Firm must submit complete Appendix II which is available at: [http://procurement.vcu.edu/files/RFP Website Link Appendix 2.pdf](http://procurement.vcu.edu/files/RFP_Website_Link_Appendix_2.pdf)*

**Price Schedule:**

*Firm should provide pricing for the proposed CRM system. The Total cost proposal shall include all fees for the provision of the products and services.*

*CRM System Software* \$ \_\_\_\_\_

*Additional proposed software modules* \$ \_\_\_\_\_

*Programming Tools* \$ \_\_\_\_\_

*Consulting Services*

- *Discovery* \$ \_\_\_\_\_
- *Conversion* \$ \_\_\_\_\_
- *Training – on-site* \$ \_\_\_\_\_
- *Training – vendor site* \$ \_\_\_\_\_
- *Training – materials, courseware* \$ \_\_\_\_\_
- *Customizations* \$ \_\_\_\_\_

*First Year Annual Cost of Maintenance and Support* \$ \_\_\_\_\_

*(or indicate that the First Year Annual Cost of Maintenance and Support is included in the cost of the System)*

*Travel and Living Expenses (if applicable)* \$ \_\_\_\_\_

*Hardware (if applicable)* \$ \_\_\_\_\_

**Total Cost** \$ \_\_\_\_\_

*Submit a pricing narrative to support the Total Cost above which describes the licensing model (User licenses (named, concurrent, enterprise), the number of licenses, unit cost, how annual maintenance is priced, details about additional software modules including cost, purpose, service expense), the programming tools, and lists the proposed hourly rates, the consultant category level (Title), and the total estimated number of hours for each hourly rate listed by specific task type or staff type that sums to the Consulting Services Total Amount.*

**A. Proposal Submission Instructions:**

1. Complete and return page 1 of the RFP. Proposals shall be signed by an authorized representative of the Offeror.

2. Complete and return signed addenda acknowledgments (if applicable).
3. Submit one (1) original hard copy (paper) of the entire proposal, including all attachments and proprietary information. The original proposal must be clearly marked on the outside of the proposal. Submit one (1) unsecured, electronic copy (on a disc or flash drive) of the entire proposal including all attachments and INCLUDING ANY PROPRIETARY INFORMATION and one (1) unsecured, electronic copy (on a disc or flash drive) of the entire proposal including all attachments and EXCLUDING ANY PROPRIETARY INFORMATION. These discs or flash drives must be clearly marked on the outside whether it includes or excludes proprietary information.
4. If applicable, the outside of the proposal must be marked to denote proprietary information is contained in the documents. **Written notice of proprietary information must be submitted as the first page of the Offeror's proposal.** Notice must specifically identify the applicable portions of the Offeror's proposal that contains data or materials to be protected and state the reasons why protection is necessary. In addition, the specific (i.e. specific words, figures or paragraphs) proprietary or trade secret material submitted, must be identified on the applicable page(s) within the Offeror's proposal, by some distinct method, such as highlighting, underlining, etc. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.
5. Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department. Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.
6. Additional information is available at:  
[http://procurement.vcu.edu/files/RFP\\_Website\\_Link\\_Additional\\_Information.pdf](http://procurement.vcu.edu/files/RFP_Website_Link_Additional_Information.pdf)

#### VII. ORAL PRESENTATION:

Offerors who submit a proposal in response to this RFP may be required to conduct an oral presentation of their proposal to VCU. Oral presentations are an option and may or may not be required. Should an oral presentation be required, VCU will designate the date and location for the presentation; the date is critical and alternative dates will not be available.

Offerors who are invited to conduct an oral presentation shall include the individual(s) who would be the primary point of contact for VCU, on the Offerors presentation team.

#### VIII. EVALUATION AND AWARD CRITERIA:

Proposals will be evaluated based upon the information provided in the Offeror's proposal using the following criteria: Offeror's qualifications and experience; methodology/approach to providing the requirements stated herein to include functionality, technology support and sustainability; price; and the Offeror's status as a Virginia certified SWaM Business or the Offeror's plans to utilize Virginia DMBE certified SWaM Businesses in the Offeror's performance of the contract. Selection shall be made of two or more Offerors deemed to be fully qualified and best suited among those submitting proposals. Negotiations shall be conducted with Offerors so selected. After negotiations have been conducted with each Offeror so selected, the agency shall select the Offeror which, in its opinion, has made the best offer, and shall award the contract to that Offeror. The Institution may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. (Governing Rules Section 49.D) Should the Institution determine in writing and in its sole discretion that only one Offeror has made the best proposal, a contract may be negotiated and awarded to that Offeror. The

award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

**IX. GENERAL TERMS AND CONDITIONS:**

General Terms and Conditions can be viewed at:

<http://procurement.vcu.edu/files/General-Terms-and-Conditions.pdf>

**X. SPECIAL TERMS AND CONDITIONS:**

- A. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to Virginia Commonwealth University will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
- B. AUDIT: The Contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The agency, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- C. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- D. PROPOSAL ACCEPTANCE PERIOD: Any proposal in response to this solicitation shall be valid for sixty (60) days. At the end of the sixty (60) days, the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
- E. PROPOSAL PRICES: Proposal prices shall be in the form of a firm unit price for each item during the contract period.
- F. CANCELLATION OF CONTRACT: The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon sixty (60) days written notice to the Contractor. In the event the initial contract period is for more than twelve (12) months, the resulting contract may be terminated by either party, without penalty, after the initial twelve (12) months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- G. SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS: The Contractor shall extend any special educational or promotional sale prices or discounts immediately to the Commonwealth during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.
- H. EXTRA CHARGES NOT ALLOWED: The proposal price shall be for complete installation ready for Commonwealth's use, and shall include all applicable freight and installation charges; extra charges will not be allowed.
- I. IDENTIFICATION OF PROPOSAL: The proposal package should be identified as follows:

From: \_\_\_\_\_

_____	_____	_____
Name of Offeror	Due Date	Time

_____	_____
Street or Box Number	RFP No.

_____	_____
City, State, Zip Code +4	RFP Title

Name of Contract / Purchase Officer or Buyer: Jackie Colbert

The package should be addressed as directed on Page 2 of the solicitation.

If a proposal is not clearly identified, the Offeror takes the risk that the proposal may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically disqualified and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intrauniversity mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.

- J. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the Contractor/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods, or equipment delivered.
- K. LIMITATION OF LIABILITY: To the maximum extent permitted by applicable law, the Contractor will not be liable under this contract for any indirect, incidental, special or consequential damages, or damages from loss profits, revenue, data or use of the supplies, equipment and/or services delivered under this contract. This limitation of liability will not apply, however, to liability arising from: (a) personal injury or death; (b) defect or deficiency caused by willful misconduct or negligence on the part of the Contractor; or (c) circumstances where the contract expressly provides a right to damages, indemnification or reimbursement.
- L. PRIME CONTRACTOR RESPONSIBILITIES: The Contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime Contractor. The Contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- M. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for nine (9) successive one (1) year periods or an aggregate of nine (9) years under the terms and conditions of the original contract except as stated in 1. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew should be provided approximately 60 days prior to the expiration date of each contract period:
  - 1. If the Commonwealth elects to exercise the option to renew the contract for additional renewal terms the additional renewal term(s) shall not exceed the contract price(s) of the previous contract period increased/decreased by more than the percentage increase/decrease of the All

Items category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

- N. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- O. WARRANTY (COMMERCIAL): The Contractor agrees that the supplies or services furnished under any award resulting from this solicitation shall be covered by the most favorable commercial warranties the Contractor gives any customer for such supplies or services and that the rights and remedies provided therein are in addition to and do not limit those available to the Commonwealth by any other clause of this solicitation. A copy of this warranty must be furnished with the proposal.
- P. WORK SITE DAMAGES: Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the Commonwealth's satisfaction at the Contractor's expense.
- Q. COMMUNICATIONS: Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department.

Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.

- R. eVA BUSINESS-TO-GOVERNMENT CONTRACTS AND ORDERS: The solicitation/contract will result in purchase order(s) with the eVA transaction fee specified below assessed for each order.
1. For orders issued July 1, 2011 thru June 30, 2013, the Vendor Transaction Fee is:
    - a) DMBE-certified Small Businesses: 0.75%, Capped at \$500 per order.
    - b) Businesses that are not DMBE-certified Small Businesses: 0.75%, Capped at \$1,500 per order.
  2. For orders issued July 1, 2013, and after, the Vendor Transaction Fee is:
    - a) DMBE-certified Small Businesses: 1%, Capped at \$500 per order.
    - b) Businesses that are not DMBE-certified Small Businesses: 1%, Capped at \$1,500 per order.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The portal is the gateway for vendors to conduct business with state agencies and public bodies.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, may provide an electronic catalog (price list) or index page catalog for items awarded. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from [www.eVA.virginia.gov](http://www.eVA.virginia.gov). Contractors should email Catalog or Index Page information to [eVA-catalog-manager@dgs.virginia.gov](mailto:eVA-catalog-manager@dgs.virginia.gov).



- S. GRAMM-LEACH-BLILEY ACT: The Contractor shall comply with the Act by implementing and maintaining appropriate safeguards to protect and prevent unauthorized release of student, faculty and staff nonpublic information. Nonpublic information is defined as social security numbers, or financial transactions, bank, credit and tax information.
- T. CONTRACT SUMMARY: The Contractor may be asked to provide to the University within fourteen (14) days after award of contract, an unsecured electronic summary of the contract. All the main features of the contract, including pricing, must be summarized. The contract summary will provide information for authorized users that choose to access the contract.
- U. CONFIDENTIALITY: The Commonwealth agrees that neither it nor its employees, representatives, or agents shall knowingly divulge any proprietary information with respect to the operation of the software, the technology embodied therein, or any other trade secret or proprietary information related thereto, except as specifically authorized by the contractor in writing or as required by the Freedom of Information Act or similar law. It shall be the contractor's responsibility to fully comply with Section 2.2-4342 F. of the *Code of Virginia*. All trade secret or proprietary information must be identified in writing or other tangible form and conspicuously labeled as "proprietary" either prior to or at the time of submission to the Commonwealth.
- V. LIMITATION OF USE: The Commonwealth's right to use computer software developed entirely at private expense may be limited by the contractor as stipulated in this contract. Notwithstanding any provision to the contrary however, the Commonwealth shall have at a minimum: unlimited use of the software on the equipment for which it is purchased; use of the software on a secondary system for backup purposes should the primary system become unavailable, malfunctions, or is otherwise rendered inoperable; use of the software at another Commonwealth site should the system be entirely transferred to that location; the right to make a backup copy for safekeeping; the right to modify or combine the software with other programs and materials at the Commonwealth's; risk; and the right to reproduce any and all documentation provided such reproduction is for the sole use of the Commonwealth. These rights are perpetual and irrevocable; in the event of any actual or alleged breach by the Commonwealth, the contractor's sole remedy shall be to pursue a monetary claim in accordance with Section 2.2-4363 of the *Code of Virginia*.
- W. NEW PRODUCTS: Unless otherwise expressly stated in this solicitation, all equipment furnished under the contract shall be new, unused equipment. All software provided under the contract shall be the latest version available to the general public as of the due date of this solicitation.
- X. QUALIFIED REPAIR PERSONNEL: All warranty, maintenance and hosting services to be performed on the items specified in this solicitation as well as any associated hardware or software shall be performed by qualified technicians properly authorized by the manufacturer to perform such services. The Commonwealth reserves the right to require proof of certification prior to award and at any time during the term of the contract.
- Y. SOFTWARE UPGRADES: The Commonwealth shall be entitled to any and all upgraded versions of the software covered in the contract that becomes available from the contractor. The maximum charge for upgrade shall not exceed the total difference between the cost of the Commonwealth's current version and the price the contractor sells or licenses the upgraded software under similar circumstances.
- Z. THIRD PARTY ACQUISITION OF SOFTWARE: The contractor shall notify the procuring agency in writing should the intellectual property, associated business, or all of its assets be acquired by a third party. The contractor further agrees that the contract's terms and conditions, including any and all license rights and related services, shall not be affected by the acquisition. Prior to completion of the acquisition, the contractor shall obtain, for the Commonwealth's benefit and deliver thereto, the assignee's agreement to fully honor the terms of the contract.
- AA. TITLE OF SOFTWARE: By submitting a proposal, the Offeror represents and warrants that it is the sole owner of the software or, if not the owner, that it has received all legally required authorizations from the owner to license the software, has the full power to grant the rights required by this solicitation, and that neither the software nor its use in accordance with the

contract will violate or infringe upon any patent, copyright, trade secret, or any other property rights of another person or organization.

**BB. WARRANTY AGAINST SHUTDOWN DEVICES:** The contractor warrants that the equipment and software provided under the contract shall not contain any lock, counter, CPU references, virus, worm, or other device capable of halting operations or erasing or altering data or programs. Contractor further warrants that neither it, nor its agents, employees, or subcontractors shall insert any shutdown device following delivery of the equipment and software.

**CC. NONVISUAL ACCESS TO TECHNOLOGY:** All information technology which, pursuant to this Agreement, is purchased or upgraded by or for the use of any State agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with the following nonvisual access standards from the date of purchase or upgrade until the expiration of this Agreement:

1. Effective, interactive control and use of the Technology shall be readily achievable by nonvisual means;
2. The Technology equipped for nonvisual access shall be compatible with information technology used by other individuals with whom any blind or visually impaired user of the Technology interacts;
3. Nonvisual access technology shall be integrated into any networks used to share communications among employees, program participants or the public; and
4. The technology for nonvisual access shall have the capability of providing equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

Compliance with the foregoing nonvisual access standards shall not be required if the head of the using agency, institution or political subdivision determines that (i) the Technology is not available with nonvisual access because the essential elements of the Technology are visual and (ii) nonvisual equivalence is not available.

Installation of hardware, software, or peripheral devices used for nonvisual access is not required when the Technology is being used exclusively by individuals who are not blind or visually impaired, but applications programs and underlying operating systems (including the format of the data) used for the manipulation and presentation of information shall permit the installation and effective use of nonvisual access software and peripheral devices.

If requested, the Contractor must provide a detailed explanation of how compliance with the foregoing nonvisual access standards is achieved and a validation of concept demonstration.

The requirements of this Paragraph shall be construed to achieve full compliance with the Information Technology Access Act, §§ 2.1-807 through 2.1-811 of the Code of Virginia.



## APPENDIX A

Terms used in this document:

ADS/LDAP	Active Directory System/ Lightweight Directory Access Protocol
CAE	Council for Aid to Education <a href="http://www.cae.org/">http://www.cae.org/</a>
CDAR	Central Development and Alumni Relations, staff located in central office, reporting to VP Marti Heil
CFR	Corporate and Foundation Relations, a department within CDAR
C/F	Corporation or Foundation
eID	VCU university login. Used for email and login to university network and resources. <a href="http://ts.vcu.edu/askit/eid/">http://ts.vcu.edu/askit/eid/</a>
DAR	Development and Alumni Relations, overarching department, lead by VP Marti Heil, includes unit staff with dotted line reporting to VP Heil
ImageNow	VCU document imaging system. Used with Banner student and financial systems. <a href="http://www.perceptivesoftware.com/">http://www.perceptivesoftware.com/</a>
Millennium	DAR database of record, formerly owned by SAGE, recently purchase by Albia. Used by VCU since 1984. 200 licensed users. <a href="http://www.abila.com/">http://www.abila.com/</a>
Paciolan	Athletic ticketing system. <a href="http://www.paciolan.com/">http://www.paciolan.com/</a>
VCU	Virginia Commonwealth University

## APPENDIX B

### Size and Description of current DAR Database (Millennium)

#### A. Statistics/Measures

1. Total records in person table
  - a. Organization (Corp/Foundations/Other Non-profit) – 22,079
  - b. People – 353,724
2. Households – 311,437
3. Deceased – 26,190
4. Total number of unique constituents – 375,803
5. Total number of alumni
  - a. Living – 171,769
  - b. Deceased – 12,185
  - c. International – 800
6. Addressable Alumni
  - a. Mail – 159,401
  - b. Email (not excluded by mail rule) – 68,928
7. Total number of donors (hard/soft credit to VCU)
  - a. Lifetime
    - i. Individuals – 175,220
    - ii. Organization – 16,795
    - iii. Alumni Dues (dues, but not donors) – 15,792
  - b. FY13
    - i. Individual – 27,125
    - ii. Organization – 1,995
    - iii. Alumni Dues (dues, but not donors) – 4,483
8. Gift Records (Gifts/Adjustments not Dues) – 624,531
9. Alumni Membership Dues records – 81,880
10. Number of Affiliations, Interests, etc. (counts in tables)
  - a. Unique Affiliations – 552
  - b. Unique Interests – 110
11. Number of records containing emails (not excluded by mail rule) – 124,540

#### B. Attributes about Data

1. Individual Attributes
  - a. Individual Demographics:
    - i. Names (Nickname, Preferred Name, Maiden Name, etc.)
    - ii. Birth Date
    - iii. Addresses (former, current, business, seasonal, preferred, etc.)
    - iv. Email Address (Home, Business, Preferred)
    - v. Phone (Home, Preferred, Business, Cell)
    - vi. Ethnicity
    - vii. Gender
    - viii. Source
    - ix. Marital Status
  - b. Degrees

- i. Dates and Campuses
  - ii. Degrees from Other Institutions
  - iii. Majors
  - iv. Concentrations
- c. Career
  - i. Employer
  - ii. Former Employers
  - iii. Dates of Employment
  - iv. Position
- d. Personal, Family - over thirty personal relationship types
  - i. Spouses
  - ii. Children
  - iii. Parent, Sibling, etc.
- e. Interests
- f. Affiliations
- g. Awards
- h. Events
- i. Faculty/Staff
- j. Board relationships
- k. Mail Rules
- l. Salutations
- m. Formal invitation name/address
- n. Gifts/Pledges (Dates, Amounts, Adjustments, Campaign)
- o. Gift Designation
- p. Memberships
- q. Correspondence received (Mail, email, phone)
- r. Deceased and Obituaries
- s. Staff Assigned
- t. Contact Reports
- u. Proposals
- v. Ratings
- w. Research profiles
- x. Giving clubs
- y. Planned Gifts
- z. Research (Survey) Participation
- aa. Alumni affiliations (Primary and additional)
- bb. Dates (Record added or Changed, Contact Date, Gift Date, etc.)
- cc. Wealth Screening
- dd. News Clippings
- 2. Stewardship records
  - a. Endowments
  - b. Scholarships
- 3. Corporate Attributes
  - a. Names
  - b. Addresses
  - c. Email Address (Business, Preferred)
  - d. Phone (Preferred, Business, Cell)
  - e. Websites
  - f. Officers

- g. Gifts/Pledges
  - h. Matching
  - i. Events
  - j. Salutations
  - k. Formal invitation name/address
  - l. Gifts/Pledges (Dates, Amounts, Adjustments, Campaign)
  - m. Gift Designation
  - n. Staff Assigned
  - o. Contact Reports
  - p. Proposals
  - q. Ratings
  - r. Research profiles
  - s. Giving clubs
  - t. Dates (Record added or Changed, Contact Date, Gift Date, etc.)
4. Account Attributes
- a. Campus
  - b. Unit
  - c. Area of Giving
  - d. General Ledger Interface
  - e. Campaign
  - f. CAE categorization
  - g. BOV approval date
  - h. Account documentation (Gift agreement, etc.)

### **C. Processes to Manage Data**

- 1. Daily/Weekly Alert Notices
  - a. Gifts and Memberships processed
  - b. Contact Report and Proposals entered
  - c. Gifts over \$5K
  - d. Contact Report entered on assigned prospect
  - e. First time donors

### **D. Data Maintenance**

- 1. Processes
  - a. Biographical Updates (Mail, Email, VCU Alumni, Development Officers, Phone calls, GoldLine)
  - b. NCOA
  - c. OneCode
  - d. Data Integrity
    - i. Validity Reports (Multiple preferred addresses, multiple team leaders, batch out of balance, invalid email, etc.)
    - ii. De-duplication (merging)
    - iii. Data Import Tool
  - e. Data Loads (New Grad file, correspondence, events)
- 2. Departments Involved
  - a. IT
  - b. Finance (Currently managed in a separate database)

- c. Administration
  - i. Gift Administration
  - ii. Account Administration
  - iii. Scholarship Tracking
- d. Development
  - i. Data and Reporting Services
  - ii. Gift Processing and Biographical Updates
  - iii. Gift Planning
  - iv. Major Gift Programs
  - v. Research
  - vi. Annual Giving and Special Giving Programs
  - vii. Events
  - viii. Communications

**E. Quality of Data**

- 1. Annual data appends of addresses, phone numbers and emails





## RFP - Addendum

---

DATE: January 13, 2014

ADDENDUM NO. 01 TO ALL OFFERORS:

Reference - Request for Proposals:	RFP# 5799845JC
Commodity/Title:	Development and Alumni Relations Constituent Relationship Management System
Issue Date:	December 19, 2013
Proposal Due:	January 28, 2014 at 11:00 AM
Revised Proposal Due Date	February 4, 2014 at 11:00 AM
Pre-Proposal Conference:	January 10, 2014 at 9:00 AM

The above is hereby changed to read: **See Attached.**

NOTE: A signed acknowledgment of this addendum must be received by this office either prior to the proposal due date and hour or attached to your proposal. Signature of this addendum does not constitute your signature on the original proposal document. The original proposal document must also be signed.

Very truly yours,

Jackie Colbert, C.P.M.

---

Name of Firm

---

Signature/Title

---

Date

Reference Page 2, RFP Due Date and Time: Change the due date and time to submit proposals to the following:

Proposals For Furnishing The Services Described Herein Will Be Received Until: 11:00 AM (EST) local time on 02/04/2014





January 30, 2014

Jackie Colbert

Virginia Commonwealth University

10 S 6<sup>th</sup> St. 2<sup>nd</sup> Floor

POB 980327

Richmond, Virginia 23298-0327

Jackie:

Please find enclosed Blackbaud's response to Virginia Commonwealth University's Request for Proposal. Blackbaud is honored to be involved with Virginia Commonwealth University and evaluated as a potential solution for your Development and Alumni Relations CRM needs. Our innovative technologies, extensive experience serving the nonprofit community including numerous public research institutions of higher education, and our continuing commitment to each of these customers are attributes that we believe make Blackbaud a great long-term partner for VCU.

The enclosed version of Blackbaud's response to Virginia Commonwealth University's Request for Proposal includes proprietary information. The proprietary information pertains to our customers, and protecting our customer's privacy remains one of our organization's highest priorities. Section 7 which lists our pricing contains sensitive information and we believe that Blackbaud derives a competitive advantage from the information it contains. We respectfully request that VCU keep this section confidential to the extent permitted under Virginia law and this RFP process. Proprietary sections:

- 2.3 – References – Includes customer information
- 2.4 – List of Higher Education Customers – Includes customer information
- Appendix IV: Sample Project Plan
- Appendix VI: Blackbaud Hosting Services – Customer Disaster Recovery Solutions
- Appendix VII: Blackbaud CRM – Support and Maintenance

We look forward to the opportunity of partnering with VCU and working together on a successful Development and Alumni Relations CRM implementation to help achieve VCU's long-term goals and objectives.

Sincerely,



John Kelly

Senior Account Executive

Blackbaud, Inc.

866-792-9552 Office

[John.Kelly@Blackbaud.com](mailto:John.Kelly@Blackbaud.com)



# Virginia Commonwealth University

## Blackbaud Response to Request for Proposal

January 30, 2014



## Table of Contents

<b>1</b>	<b>Executive Summary .....</b>	<b>6</b>
1.1	Our Understanding of VCU's Needs .....	7
<b>2</b>	<b>Experience and Qualifications of the Firm .....</b>	<b>8</b>
2.1	Experience and Qualifications to Provide the Required Services .....	8
2.2	Experience and Qualifications of Proposed Personnel .....	8
2.3	References – Proprietary .....	14
2.4	List of Higher Education Customers – Proprietary .....	15
2.5	Amount of Annual Sales with VASCUPP Member Institutions .....	17
<b>3</b>	<b>Other Related Goods/Services .....</b>	<b>19</b>
<b>4</b>	<b>Sustainability.....</b>	<b>20</b>
<b>5</b>	<b>Appendix I: Small, Women-Owned and Minority-Owned Business Commitment .....</b>	<b>21</b>
<b>6</b>	<b>Appendix II: Invoicing and Payment .....</b>	<b>24</b>
<b>7</b>	<b>Price Schedule .....</b>	<b>27</b>
7.1	Pricing Assumptions .....	27
7.2	Tailored, Best Practice Approach Pricing .....	27
7.3	Tailored, Best Practice Approach Pricing Assumptions.....	31
7.4	Custom Approach Pricing .....	35
7.5	Custom Approach Pricing Assumptions.....	39
<b>8</b>	<b>Appendix III: Blackbaud Response to Statement of Needs .....</b>	<b>43</b>
8.1	Required Features .....	43
8.2	Data Needs .....	45
8.3	Operational Needs .....	61
8.4	Technology .....	81
8.5	Reporting and Self Service Functions.....	95
8.6	General .....	100



9	Appendix IV: Sample Project Plan – Tailored Best Practice Approach.....	104
	Appendix V: Blackbaud Travel Policy .....	109
	Appendix VI: Blackbaud Hosting Services – Customer Disaster Recovery Solutions.....	113
	Appendix VII: Blackbaud CRM – Support and Maintenance .....	116

# 1 Executive Summary

Blackbaud is honored to be included in Virginia Commonwealth University's RFP process and to be evaluated as an alternative to your current Development and Alumni Relations system. We believe our innovative and comprehensive Development and Alumni Relations Constituent Relationship Management (CRM) solution, extensive experience in Higher Education with schools similar to Virginia Commonwealth University (VCU), and our continuing commitment to this market and the success of our clients are attributes that make Blackbaud a great long-term partner for VCU.

The solution we are proposing in this RFP response is Blackbaud CRM which utilizes our hosting services and represents more than 30 years of dedication to the nonprofit industry's needs and is our best interpretation of the requirements set forth in the VCU RFP. Blackbaud CRM is a robust and comprehensive solution that combines the functions and data that a complex Development and Alumni Relations operation require into one database. The ability to manage all of your Development and Alumni Relations interactions with your constituents, information, and processes in one tool allows for greater knowledge of your constituents and the ability to optimize efficiencies and revenue in key areas. Should Blackbaud be selected after this RFP process, then we would like to engage with VCU in a detailed discovery phase to further refine our proposed solution as needed and to make sure expectations between VCU and Blackbaud are consistent.

Servicing 28,000 clients, Blackbaud is the leading global provider of software and related services designed specifically for nonprofit organizations. Our products and services enable nonprofit organizations to increase donations, reduce fundraising costs, improve communications with constituents, optimize internal operations and business processes and leverage the power of the Internet. We have focused solely on the nonprofit market since our incorporation in 1982, and have developed our suite of products and services based upon our extensive knowledge of the operating challenges facing nonprofit organizations with significant investment around tailoring our CRM solution for Higher Education.

Blackbaud also offers a full range of services that help our customers implement our software to optimize internal operations and make the most of their investments. Our extensive Training team prepares our customers to use the software to its full potential, while our experienced Consulting Services team, comprised of former fundraisers and system experts, partners with our customers to align the new system with their business processes and unique needs. We also offer hosting services so that institutions can rely on Blackbaud to ensure that their solution is always available and up to date, on the latest infrastructure, and in compliance with all the latest industry security requirements.

We hope that we are invited to show how our partnership with VCU will put in place a long-term technology and business process infrastructure on which to grow and streamline day-to-day operations for Development and Alumni Relations at VCU. We believe that Blackbaud is uniquely qualified to make a profound impact at VCU and that we offer the most effective long-term solution available in the market today.

On behalf of the more than 2,800 Blackbaud Team members located around the world we thank you for your consideration.

## 1.1 Our Understanding of VCU's Needs

Based upon our knowledge of VCU through our existing relationships with The VCU Foundation, Alumni Foundation and Massey Cancer Center and from review of this RFP it is our understanding that the main objectives for replacing the current Development and Alumni (DAR) system are as follows:

- To put in place an intuitive and easy to use, comprehensive solution that supports best practices in key areas such as major gifts, helps VCU optimize revenue and engagement activities in DAR and can also be tailored to the nuances that makes VCU unique.
- The solution must be proven to have handled the volume and complexity of similar public research development and alumni relations operations with robust medical center's like VCU, be built on a contemporary technology platform allowing for integration with other systems and include robust and granular security features.
- VCU is looking for a long-term partnership with a mature and stable company that has a proven track record in the higher education market. VCU needs a solution that can help them succeed not just with the next major fundraising initiative but also initiatives thereafter and beyond.

While each institution that we work with is very unique, several of the overarching themes and requirements listed above and in this RFP are areas where we have helped other similar schools including:

- Consolidation of multiple systems and processes into one development and alumni solution to gain better knowledge of their constituents and improve efficiency.
- Helping to drive additional revenue in key areas such as principal, major and annual giving and putting in place a long-term technology and business process infrastructure on which to grow.
- Implementing a best practice solution that also offers tools to configure and tailor the solution for school specific requirements where appropriate.
- Providing easier and timelier access to information for end-users via reports, queries and dashboards.
- Offering a contemporary and robust integration toolset with proven experience in integrating with Ellucian's Banner, Paciolan, The Financial Edge (Blackbaud), Convio TeamRaiser (Blackbaud), document management systems, and numerous other systems across campus.
- Success in performing data conversions from Millennium with experience converting more than 30 schools from this solution into a Blackbaud solution.
- Experience in managing sensitive data and adhering to HIPPA, FERPA and PCI compliance rules.

We look forward to the opportunity of working with the VCU team to learn more about your unique requirements and how Blackbaud can partner with you to meet those needs for many years to come.



## 2 Experience and Qualifications of the Firm

### 2.1 Experience and Qualifications to Provide the Required Services

*Describe the experience and qualifications of your firm to provide the required services.*

**Blackbaud Response:** Serving the nonprofit community for 30 years, Blackbaud (NASDAQ: BLKB) combines technology and expertise to help organizations achieve their missions. Blackbaud works with more than 28,000 customers in over 60 countries that support higher education, healthcare, human services, arts and culture, faith, the environment, independent K-12 education, animal welfare and other charitable causes. The company offers a full spectrum of cloud-based and on premise software solutions and related services for organizations of all sizes, including fundraising, eMarketing, advocacy, constituent relationship management (CRM), financial management, payment services, analytics and vertical-specific solutions. Using Blackbaud technology, these organizations raise more than \$100 billion each year. Recognized as a top company by *Forbes*, *InformationWeek*, and *Software Magazine* and honored by Best Places to Work, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, the Netherlands, and the United Kingdom. For more information, visit [www.blackbaud.com](http://www.blackbaud.com).

### 2.2 Experience and Qualifications of Proposed Personnel

*Provide information about the experience and qualifications of the personnel proposed to work on the project with VCU. Why does this experience and qualifications make them the best choice for this project?*

**Blackbaud Response:** Blackbaud has a large Professional Services team of over 900 employees that includes former Big 4 consultants, PMI-certified project managers, former top industry fundraisers, and technology experts.

We believe that appropriate allocation of resources is critical to the success of any project, and that successful implementations require a teamwork and knowledge-sharing approach. Blackbaud feels that it is critical to work together to make sure each organization has the right team members available at the right time, so staffing decisions for each project are made when the project is scheduled based on project scope, duration and resource skill set and availability. This collaborative relationship between the customer and Blackbaud project team leverages the resources of both organizations to ensure effective communications, seamless project execution and the most effective system design.

#### 2.2.1 Blackbaud Role Descriptions

Blackbaud Professional Services engagements typically include the following resources:

- **Executive Sponsor** - Provides executive leadership and an escalation point for the project.

- **Engagement Manager** - Manages the entire delivery of the assessment project; acts as main point-of-contact for the project; coordinates the production and delivery of assessment findings document. Ensures the successful and timely execution of project tasks, reviews and approves project deliverables, conducts project status reporting, and escalates issues to the appropriate customer resource for resolution.
- **Solution Consultant** – Through a proven delivery of design, testing and deployment support, the consultant provides industry best practices and guides the customer on the recommended approach for implementing Blackbaud CRM, testing and deployment to ensure system success.
- **Technical Consultant** – Guides customer technical resources and provides knowledge transfer on the analysis, build, testing and deployment of custom interfaces and custom solutions.
- **Programmer Consultant** – Implements the requirements for the custom integrations and solutions. Provides expertise on customization possibilities for the customer based on other like institutions.
- **Conversion Programmer** - Analyzes the data and storage structure of the customer's current constituent management systems to accurately estimate the work effort, data mapping, and testing for the data conversion to Blackbaud CRM.

## 2.2.2 Sample Bios

Due to the size of Blackbaud's operations and when VCU would begin an implementation project, it is difficult to say with certainty which of our employees would be assigned to VCU's implementation, if selected. For your reference, the following high-level biographies are provided as representative examples of Blackbaud consultants, their relevant experience, and skill-set. These are just a few of the professionals that Blackbaud might leverage to deliver a successful implementation. It is our philosophy to make staffing decisions for the project when the project is scheduled based on project scope, resource subject matter expertise, location and availability.

### 2.2.2.1 Sample Bio: Principal Consultant

#### Experience

The Ohio State University, Senior Consultant

- Project products: Blackbaud CRM and Internet Solutions, several customizations to transfer data and enhance functionality.
- Project challenges: converting data and business processes from limited "home grown" system to an environment with greater flexibility and areas for growth, building document imaging integration for gift processing.
- Responsibilities: business process design, system configuration, data validation and documenting data mapping changes and instructions, conduct/assist with user acceptance testing, review go-live training materials for end users

## Florida State University, Project Manager and Senior Consultant

- Project products: The Financial Edge, The Raiser's Edge, PaperSave, Blackbaud NetCommunity and a customization to transfer data to and from the athletics ticketing system.
- Project challenges: conversions to The Financial Edge and The Raiser's Edge from several different source databases, integrating the business processes from various and separate areas of campus into one shared set of business processes. Developed a new, enhanced scholarship award tracking process in The Raiser's Edge. Went live 2 months ahead of original schedule.
- Role: Senior Raiser's Edge consultant for the entire length of the project (14 months) and project manager for the final nine months.
- Responsibilities: business process Blueprints, data validation, and documenting data mapping changes and instructions, updating and managing project plan and budgets, and conducting go-live training for end users.

## Washington and Lee University, Project Manager and Senior Consultant

- Project products: The Raiser's Edge, PaperSave, Blackbaud NetCommunity
- Project challenges: entrenched business processes (some over 20 years old) in an institution with a strong sense of tradition. In cooperation with Washington and Lee design team, created efficient, innovative processes that still honored the traditions and expectations from the past for Advancement, donors, and alumni.
- Role: Project manager and Senior Raiser's Edge consultant for length of project (nine months)
- Responsibilities: business process blueprints, data validation and documenting data mapping changes and instructions, and managing project plan and budget. Improved efficiency of gift-entry process, transfer of information between development and the business office.

## University of North Dakota Foundation, Senior Consultant

- Project products: The Raiser's Edge and Blackbaud NetCommunity
- Project challenges: university was preparing for a major campaign and assisted in revamping prospect management for campaign tracking and reporting, and assisted business office and advancement services with streamlining gift entry and fee management processes.
- Role: Took over as Senior Consultant 1/3 of the way through the project and was the Blackbaud NetCommunity consultant for the project (entire length of involvement was 12+ months. Subsequently conducted an Advancement Services audit to help streamline functions and activities.
- Responsibilities: The Raiser's Edge business process blueprints, data validation and documenting data mapping changes and instructions, Blackbaud NetCommunity design documents.

Before joining Blackbaud, this consultant was a member of the University Advancement staff at James Madison University for over 12 years. During her time there she served as the Director of Advancement Services and the Director of Donor Relations.

This consultant is a volunteer for the Evans Home for Children; a past board member and on-air reader for the Valley Voice, an organization serving the visually impaired; and a past volunteer for the Shenandoah County Humane Society.

**Education**

Bachelor of Arts in Foreign Affairs, University of Virginia

Master of Arts in English Literature, James Madison University

**Location**

This consultant is based in the Shenandoah Valley of Virginia

**2.2.2.2 Sample Bio: Engagement Manager**

This project manager brings over 14 years of nonprofit fundraising and management experience to her position at Blackbaud. This allows her to provide customers with fundraising best practices and a comprehensive perspective on conversions, business process improvement, donor-centered stewardship, and direct marketing.

This employee has been with Blackbaud since 2005 and is responsible for managing enterprise implementations across all verticals, with a focus on Higher Education institutions. During her tenure, she has worked with many prominent universities and colleges, several of the nation's largest human services agencies, and the largest zoological society in the country.

Prior to joining Blackbaud, this employee served as the VP of Development for the largest general fine arts museum in Oklahoma. She began her development career as a Database Administrator and has held a multitude of positions providing her experience with all aspects of fundraising including prospect research, special events, major gift, corporate/foundation, direct marketing, online giving, planned giving and capital campaign fundraising.

This employee is a member of the Association of Fundraising Professionals and the National Council of Planned Giving. She continues to be an active volunteer for the ASPCA, the Alzheimer's Association, and the Ocean Conservancy.

**Education**

This employee holds a dual Bachelor of Arts degree in History/Political Science from Samford University and a Master of Arts in History from the University of Alabama.

She has also earned Certified Fund Raising Executive (CFRE) accreditation.

Professionals granted this internal credential have met a strict series of standards, which include successful tenure in the profession, continuing professional education, significant professional achievement, and a commitment to best fundraising practices.

**Location**

This employee is based in Charleston, Sout Carolina.

### 2.2.2.3 Sample Bio: Educational Consultant

#### Background

This Educational Consultant combines her passion for education and love for working with nonprofits. At Blackbaud, she specializes in The Raiser's Edge, The Education Edge, and Blackbaud CRM software applications. She delivers high-quality, in-depth training to customers at regional training facilities, online classes, and on site.

Prior to joining the Blackbaud team, this consultant worked in both the nonprofit and education fields. She was a publications assistant at a breast cancer research center where she was responsible for creating all print materials as well as developing and implementing a website redesign. This employee also taught composition on the university level.

This consultant has volunteered with Susan G. Komen for the Cure, the Joseph F. Sullivan Center Breast Cancer Fund, and Safe Harbor, a shelter offering housing and counseling to victims of domestic violence.

#### Education

This consultant earned a Master of Arts in Professional Communication with a Health Communication Certificate. She also graduated cum laude from Clemson University with a Bachelor of Arts in Communication Studies and minor in Advertising and was a member of Lambda Pi Eta, communication honor society.

#### Location

This consultant is based in Atlanta, Georgia.

### 2.2.2.4 Sample Bio: Senior Consultant

#### Experience

This consultant's extensive experience in implementing technology solutions with nonprofit organizations provides customers with fundraising best practices for data conversions, donor-centered stewardship, direct marketing, moves management, and online strategies. His experience with managing long-term projects has ensured customers receive value out of their technology investment.

This consultant brings experience in successful nonprofit development to Blackbaud. As development manager for Energy Outreach Colorado, he managed the organization's annual fundraising campaign including direct mail as well as online, individual, and corporate giving programs. Before joining Energy Outreach Colorado, he coordinated multi-million dollar fundraising campaigns with Mile High United Way in Denver and United Way of the Midlands in Omaha, Nebraska.

As a Senior Consultant for Blackbaud, this employee has consulted with major universities, a prestigious military academy, and other well-known foundations across the nation. He has served as a Project Manager, overseeing several large long-term implementations with higher education customers.

When he is not leading Blackbaud projects, he enjoys time volunteering with Habit for Humanity – Denver and Energy Outreach Colorado. He has served on the board of directors for Healing from the Heart, a nonprofit organization that provides mental health services to youth and their families who seek help in healing from adverse life experiences.

**Education**

This consultant holds a Bachelors of Science in Business Administration degree in Marketing from Creighton University and a Masters in Business Administration degree in marketing from Regis University. He has received a Certificate in Principles & Techniques in Fundraising from Indiana University.

**Location**

This consultant is based in Washington, D.C.

### 2.2.2.5 Sample Bio: Principal Consultant

**Background**

This consultant has over 10 years of experience in the Business Intelligence (BI) area with profit and nonprofit organizations. He has worked for several leading/premier organizations such as KPMG Management Consulting and Hyperion Software.

Upon joining Blackbaud, this consultant was instrumental in bringing the Business Intelligence solution, The Information Edge, to market; he worked very closely with the products team to define the solution and with initial customers to promote and deliver the solution. He is the founder of the Business Intelligence practice at Blackbaud and has developed a number of solution offerings that are now standard.

Combined with his strong IT and consulting background, Alan also possesses excellent marketing knowledge and experience. While at Blackbaud Alan has used this knowledge to successfully deliver Business Intelligence applications and solutions for clients that include a children's healthcare organization, a regional environmental group, a branch of a nation-wide health and human services organization, a major Southern public university, a regional community foundation, and an international faith-based outreach group.

**Education**

This consultant graduated with a Bachelor of Science degree in Computer Science and Management Studies from the University of Leeds in England, and has a Master of Science degree in Business Systems Analysis from City University, London, England. This employee also has a postgraduate diploma in Marketing from Cambridge Marketing College, England. He holds full member status in the Chartered Institute of Marketing, the world's largest professional marketing organization.

**Location**

This employee is based in Charleston, South Carolina.

We have included below what Blackbaud products and services each member institution of VASCUPP utilizes from Blackbaud. We have a relationship with all but one of the member institutions utilizing one or more of our solutions and services. The annual sales for each organization varies greatly based upon which products or services they are utilizing.

School	Blackbaud Client	Blackbaud Products Utilized
Virginia Military Institute	Yes	The Raiser's Edge, The Financial Edge, Net Community (online giving and engagement) and Target Analytics (screening and research)
Virginia Commonwealth University	Yes	The Financial Edge (several Foundations), TeamRaiser (Massey Cancer Center) and in the past Target Analytics (DonorCentrics)
University of Virginia	Yes	The Financial Edge (several UVA Foundation using on campus) and Target Analytics (screening, modeling and wealth)
Radford University	Yes	Target Analytics (wealth and modeling services)
Virginia Tech	Yes	Target Analytics (wealth and modeling services)
William and Mary	Yes	Target Analytics (wealth and modeling services)
Old Dominion University	Yes	Using FundWare, one of our accounting solutions.
George Mason University	No	
James Madison University	Yes	JMU uses DonorCentrics and Dashboards.

### 3 Other Related Goods/Services

*Describe other products and/or services provided by your firm that may be utilized by VCU. Explain how the fee schedule would be established for these products / services during the contract term (or submit the fee schedule) and your firm's ability to provide most favored nations pricing. Also, explain how VCU would be notified of newly introduced products / services.*

**Blackbaud Response:** Below are the other products and services that we believe may be beneficial for VCU to consider. Many of our Blackbaud CRM clients utilize some or all of the services/products listed below. Preliminary pricing is listed below but exact pricing would be determined through further dialogue with VCU staff around needs and size of the data set that VCU would like Blackbaud to screen, model, cleanse etc.

- **Wealth Screening** – Uncover the hard assets, wealth indicators, non-profit connections and philanthropic activities of your constituents. (\$20,000 to run entire VCU file).
- **Custom Predictive Models** – These models are built specifically for VCU and can score your constituents on how likely they are to give VCU a Principal, Annual, Major or Planned Gift. (\$10,000-\$20,000 each).
- **Alumni Activation Package** – If you are trying to grow alumni participation this service is critical. We are able to match you file against the Blackbaud Cooperative Database of over 1.8 Billion charitable donations so you can see which constituents are most active givers, what types of organizations they are supporting, what giving channel (online, direct mail, phone) they are using to give along with their financial liquidity. (\$25,000 for 250,000 records + \$100 per 1,000 additional).
- **DonorCentrics and Dashboards** – Delivers a series of reports and dashboards that provide trend analysis of your annual giving program over a six-year period. It also places VCU into a benchmarking group with other larger public institutions to see how they compare in areas such as Overall Giving, Donor Retention, Donor Acquisition, Lapsed Donor Reactivation, and Lifetime Value. (\$8,500 for donorCentrics report and benchmarking plus \$25,000 to add the dashboards)
- **Connection360** – Serves banner ads to your constituents while they surf online (*i.e. when I am at ESPN.com the banner on the side of the screen could be to give to the annual fund, buy season tickets, support the campaign, etc.*). The ads are typically served alongside your other marketing/fundraising efforts to increase awareness and participation. Included with the service is closed loop analysis reporting that lets you clearly see the return on investment as well as lift created in the test vs. control groups. (typically \$40,000+ for a 3-5 month campaign that serves approximately 5,000,000 ads)
- **Address Processing** – Allows schools to CASS certify and NCOA their constituents addresses one off or in bulk. Pricing is dependent on the size of the data file but all tools are built into Blackbaud CRM with seamless processing. The updating is a subscription services and starts at \$4,100 per year for 8 address screenings per year (400,000 records each screening).



## 4 Sustainability

*Provide information to demonstrate the overall environmental impact of your proposed approach. Include information on your recommendations to reduce the environmental impact and create efficiencies.*

**Blackbaud Response:** Blackbaud maintains its commitment to reducing the environmental impact of its work in every project that it takes on. Organizational policies that contribute to sustainable business practices include:

- Blackbaud's commitment to assign consultants to implementations that are in the nearest geographic proximity to the site of the project.
- Blackbaud strives to maintain a paperless office environment by maintaining an extensive digital library and printing documentation only absolutely necessary.
- Blackbaud will conduct meetings where appropriate remotely via phone and web in order to reduce unnecessary travel to VCU of Blackbaud staff.

## 5 Appendix I: Small, Women-Owned and Minority-Owned Business Commitment

*Firm must submit complete Appendix I which is available at*

*[http://procurement.vcu.edu/files/RFP\\_Website\\_Link\\_Appendix\\_1.pdf](http://procurement.vcu.edu/files/RFP_Website_Link_Appendix_1.pdf) unless the firm is a DMBE certified small business.*

*DMBE certified small businesses must include their certification number on the coversheet of this RFP, but are not required to complete Appendix I.*

**Blackbaud Response:** Blackbaud is the designer, manufacturer and implementer of our products and does not use any third party vendors for the distribution or implementation of our software products. Therefore, Blackbaud does not anticipate the need to outsource any aspect of VCU's implementation, if selected. As a publicly traded company, Blackbaud will not be doing business with any small, women-owned, or minority-owned businesses.

Blackbaud is proud of its commitment diversity, and does not discriminate in employment opportunities or practices on the basis of race, color, religion, sex, national origin, age, disability, gender orientation, gender identity, gender expression, or any other characteristic protected by law. This policy governs all aspects of employment, including job selection, job assignment, compensation, performance evaluations, discipline, demotion, termination, benefits, and training.

## APPENDIX I

### PARTICIPATION IN STATE PROCUREMENT TRANSACTIONS SMALL BUSINESSES AND BUSINESSES OWNED BY WOMEN AND MINORITIES

The following definitions will be used in completing the information contained in this Appendix.

#### Definitions

- **Small business** is an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. Nothing in this definition prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or federal guideline to be in compliance with a federal grant or program.
- **Women-owned business** is a business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority-owned business** is a business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals.
- **Minority Individual:** "Minority" means a person who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:
  - "Asian Americans" means all persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marinas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
  - "African Americans" means all persons having origins in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
  - "Hispanic Americans" means all persons having origins in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.
  - "Native Americans" means all persons having origins in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
  - "Eskimos and Aleuts" means all persons having origins in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.

PARTICIPATION BY SMALL BUSINESSES, BUSINESSES OWNED BY WOMEN  
BUSINESSES OWNED BY MINORITIES

This appendix should only be completed by firms that are not Virginia Department of Minority Business Enterprise (DMBE) certified small businesses.

Offeror certifies that it will involve Small Businesses, Women-Owned Businesses, and/or Minority-Owned Businesses (SWaM) in the performance of this contract either as part of a joint venture, as a partnership, as Subcontractors or as suppliers.

List the names of the SWaM Businesses your firm intends to use and identify the direct role of these firms in the performance of the contract. State whether the firm is a Small Business (SB), Women-Owned (WO), or Minority-Owned (MO).

<u>Name of Businesses:</u>	<u>SB, WO, MO:</u>	<u>Role in contract:</u>
----------------------------	--------------------	--------------------------

N/A

**Commitment for utilization of DMBE SWaM Businesses:**

0 % of total contract amount that will be performed by DMBE certified SWaM businesses.

**Identify the individual responsible for submitting SWaM reporting information to VCU:**

Name Printed: N/A

Email: N/A

Phone: N/A

Firm: N/A

Offeror understands and acknowledge that the percentages stated above represent a contractual commitment by the Offeror. Failure to achieve the percentage commitment will be considered a breach of contract and may result in contract default.

Acknowledged

By (Signature):



Name Printed: John Kelly

Title: Enterprise Account Executive

Email: John.Kelly@Blackbaud.com

Note: Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Minority Business Enterprise (DMBE; <http://www.dmbv.virginia.gov/swamcert.html>) to fulfill the Offeror's commitment for utilization.

## 6 Appendix II: Invoicing and Payment

*Firm must submit complete Appendix II which is available at:*

[http://procurement.vcu.edu/files/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://procurement.vcu.edu/files/RFP_Website_Link_Appendix_2.pdf)

**Blackbaud Response:** Currently Blackbaud does not have the capability to deliver invoices electronically via the Ariba or other e-commerce channels. Blackbaud will work with VCU to make the invoicing process as efficient as possible and comply with VCU requirements where possible. Currently our invoices are sent via U.S. Postal Service and e-mail and do include the level of detail that VCU is requesting.

## APPENDIX II

### INVOICING AND PAYMENT

#### Invoicing:

The Contractor shall submit a fully itemized invoice to Virginia Commonwealth University, Accounts Payable and Support Services, P. O. Box 980327, Richmond, VA 23298-0327, that, at minimum, includes the following information: the Virginia Commonwealth University purchase order number; a description of the goods or services provided; quantities; unit prices; extended prices; and total prices. Payment will be issued in accordance with the payment method selected below and with the Commonwealth of Virginia Prompt Payment Legislation.

Upon request by VCU, the Contractor shall submit invoices electronically using the Ariba Network or other e-commerce channel utilized by VCU; and agrees to comply, within reason, with any future e-commerce initiatives including, but not limited to: procurement, procurement content, sourcing or any other electronic procurement and sourcing solutions.

*Currently Blackbaud does not have the capability to deliver invoices electronically via the Ariba or other e-commerce channels. Blackbaud will work with VCU to make the invoicing process as efficient as possible and comply with VCU requirements where possible. Currently our invoices are sent via U.S. Postal Service and e-mail and do include the level of detail that VCU is requesting.*

Questions regarding this method of invoicing should be sent to: [ecommerce@vcu.edu](mailto:ecommerce@vcu.edu).

#### Payment:

VCU Procurement Services is automating the payment process to the greatest extent possible. Contractors are encouraged to accept payment electronically through the commercial card program. Please review the payment methods described below and select one for your firm. By selecting the payment method below, Contractor acknowledges that the selected payment method is **not specific to the contract resulting from this solicitation and will apply to all payments made to the Contractor** by Virginia Commonwealth University. For example, if the Contractor has an existing contract(s) and is currently receiving payment by paper check, and the Contractor is now electing to receive payment by the commercial card, **all payments** will be made using the commercial card once the commercial card payment process is implemented for the firm.

#### **Payment Methods**

**1. Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later.

It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid.

Failure to accept the commercial card after award of contract will be considered a contract

compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card.

Questions regarding this method of payment should be sent to [commcard@vcu.edu](mailto:commcard@vcu.edu).

2. **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: <http://www.vcu.edu/treasury/VendorACH.htm>.

**Contractor must indicate the method of payment selected:**

☐ Commercial Card Payment (Wells Fargo VISA)  
☒ Automated Clearing House (ACH)

**Invoicing and Payment Method Acknowledgement:**

Signature:  
Name Printed:  
Title:  
Name of Firm:  
Date:

Christine Milborn  
Christine Milborn  
Contracts Manager  
Blackboard  
1/28/14

Please identify the following contact information for the individual who will serve as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:

Name of the individual:  
Title:  
Mailing address:  
Email address:  
Phone number:  
Fax number:

Kim Kiggins  
Manager, Credit & Collections  
501 N. Pennsylvania Pkwy  
Indianapolis, IN 46280  
Kim.Kiggins@blackboard.com  
800-443-9491  
843-216-6100

## 7 Price Schedule

### 7.1 Pricing Assumptions

Blackbaud is presenting VCU with two approaches to implement the Blackbaud CRM solution. Blackbaud is considering the two approaches to represent a range in the professional services consulting fee. The range represents the Custom Approach (high-end of range) and Tailored, Best Practice Approach (low-end of range). Through the discovery efforts and further engagement with VCU, Blackbaud will adjust consulting fees based on approach and agreed upon requirements.

Blackbaud CRM can be implemented in two distinct ways:

1. **Tailored, Best Practice Approach:** This approach leverages Blackbaud's extensive industry knowledge of higher education institutions and provides customer a prescriptive approach to the implementation by recommending business processes and efficiencies. This assumes the customer is willing to take a less-customized approach to the solution and agrees to shorter timeline (12–14 months).
2. **Custom Approach:** A custom approach to the implementation means Blackbaud will focus on the requirements, As Is and To Be states and will discuss pros and cons of various business processes. This approach may include customizations and configurations to meet business needs. A custom approach timeline may take (16–24 months) depending on the complexity of the solution, number of units involved and degree to accepted business process change.

Blackbaud will work with VCU to further explain both approaches and assist with determining which implementation approach is right for the desired solution. After a Discovery effort with VCU, Blackbaud will be able to provide a detailed project plan that will include high-level tasks, hours, timeline and resources that will be required to fit either of these approaches. Blackbaud has included a sample project plan in Appendix IV to represent a Tailored, Best Practice Approach

### 7.2 Tailored, Best Practice Approach Pricing

Tailored/Best Practice Approach Estimated Fees for Virginia Commonwealth University			
Blackbaud Software	Quantity	Rate	Total
CRM System Software (concurrent)	100 users	N/A	\$799,690
Additional Proposed Software Modules			N/A
Programming Tools (SDK Support Subscription)	3	\$6,000	\$18,000
Consulting Services (includes Implementation and Integration Services)	4,576 hours	\$250 – \$225	\$1,089,100
Discovery		Fixed Priced Fee	\$10,000
Conversion	1,600 hours	\$200	\$320,000



Training – On-Site	384 hours	\$200	\$76,800
Training – Vendor Site			n/a
Training – Materials, Courseware		Fixed Priced Fee	\$17,500
Customizations – Packaged		Fixed Priced Fee	\$40,400
First Year Annual Cost of Maintenance and Support (or indicate that the First Year Annual Cost of Maintenance and Support is included in the cost of the System)	N/A	N/A	1 <sup>st</sup> year included software costs
Travel and Living Expenses – Estimate only			\$96,000
Hosting Fees – Blackbaud Hosting fee for pre-production/implementation environments (1 <sup>st</sup> year)	12 Months	Annual fee	\$54,804
Hardware	N/A	N/A	N/A
The Blackbaud Solution Total			\$2,522,294

### 7.2.1 Pricing Narrative for Tailored/Best Practice Approach

**CRM System Software:** Blackbaud CRM pricing listed is based on a 100 concurrent user license of the system and is a one-time fee.

**Additional proposed software modules:** Blackbaud CRM includes all the core functional areas typically required for a Development and Alumni operation as sophisticated as VCU. BBCRM also includes our online Blackbaud Internet Solution (BBIS) for online giving, events, membership, mass e-mailing, directories and profile updates. We have listed out other subscription services that VCU may want to consider consolidating processes and information into one alumni and development CRM solution in Section 3: Other Related Goods and Services.

**Programming Tools:** Blackbaud includes a Software Development Toolkit and the annual fee listed in this section is for 3 programmers to have access to our SDK support resources to assist with any questions during use of the SDK Toolkit.

**Consulting Services/Discovery:** Each implementation of Blackbaud CRM is unique and tailored for each institution. Details on the tailored/best practice approach breaking down our estimate by hours and resource is listed in the grid below. For a project of this size and complexity we would typically conduct a discovery phase that would allow us to understand and document requirements, work effort, assumptions, and risks for this project in greater detail. The outcome of this discovery phase would be a comprehensive scope of work tailored for VCU. The \$10,000 discovery fee is what a typical higher education discovery effort would cost.

Service Description	Rate	Hours	Fee
Engagement Manager	\$250	800	\$200,000
Project Advisor	\$250	40	\$10,000

Fundraising Consultant	\$250	800	\$200,000
Configuration Consultant	\$225	1,200	\$270,000
System Architect	\$250	220	\$55,000
Tech Consultants	\$250	520	\$130,000
Interactive Consultants	\$225	476	\$107,100
Business Intelligence Consultant	\$225	520	\$117,000
<b>Total</b>		<b>4576</b>	<b>\$1,089,100</b>

**Conversion:** Based upon information contained in this RFP and significant experience in the past with converting from Millennium we estimate that it will take 1,600 hours to fully convert the data in Millennium to Blackbaud CRM. More details around the conversion can be found in [Section 7.3.2: Data Conversion](#).

**Training – On-Site:** Blackbaud has included 384 hours of onsite training for the various users and technical resource on the VCU project. We recommend utilizing a train-the-trainer approach to end-user training with support from Blackbaud training staff. For the more technical topics (report writing, SDK Toolkit etc.) we utilize expert technical staff to train a core technical team onsite at VCU to facilitate knowledge transfer. More details can be found in the grid below and in [Section 7.3.6: Training](#).

Service Description	Rate	Hours	Fee
<b>Training</b>			
Project Team Training	\$200	84	\$16,800
Train-the-Trainer Training	\$200	84	\$16,800
Online Build Training	\$200	36	\$7,200
Data Warehouse Training	\$200	24	\$4,800
Report Writer Training	\$200	36	\$7,200
Page Designer Training	\$200	12	\$2,400

Data Output Training	\$200	12	\$2,400
Software Developer Kit Training	\$200	96	\$19,200
<b>Total</b>		<b>384</b>	<b>\$76,800</b>

**Training – Vendor Site:** We find that training is much more effective if conducted at the client's site utilizing your data. As such our proposal includes the bulk of our training onsite at VCU.

**Training – Materials, Courseware:** Blackbaud has included editable courseware called Jumpstart in this proposal. This is what is included in the \$17,500 fee.

**Customizations – Packaged:** Blackbaud has developed pre-built customizations that we have developed to serve the higher education market. These customizations are fixed price and have been included in this section based upon the VCU RFP requirements. They include a Region Code, a Grateful Patient Program and an enhancement to manage more complex Multi-Level Events. After further discussion with VCU we may find that VCU do not need all of these pre-packaged customizations. More detail can be found in the table below around the fees for each solution.

Service Description	Rate	Hours	Fee
<b>Customizations – Packaged</b>			
Region Code Customization	\$5,400	FP	\$5,400
Multi-Level Events Customization	\$20,000	FP	\$20,000
Grateful Patient Customization	\$15,000	FP	\$15,000
<b>Total</b>	<b>\$40,400</b>	<b>FP</b>	<b>\$40,400</b>

**First Year Annual Cost of Maintenance and Support:** First year of maintenance and support is included in the initial software fees.

Year 2 maintenance fees for VCU would be \$208,450 which would include:

- All upgrades released for Blackbaud CRM
- Support resources including phone and website along with customization and hosting support

- A Technical Account Manager (TAM). The TAM would oversee all VCU support cases and interactions with support and hosting. This TAM would be involved during the first year of the project to gain an understanding of how VCU has set up Blackbaud CRM and use specific to VCU.
- Mass e-mail sending fees that utilizes the tools in the Blackbaud Internet Solution
- The annual maintenance fee is calculated as a percentage of the software costs.

**Travel and Living Expenses** – Blackbaud adheres to the federal guidelines on travel expenses for our staff. We have included our travel policy in Appendix V for your review. For the purpose of this RFP response we have estimated travel costs which would include hotel, meals and travel for Blackbaud staff assigned to this project.

**Hosting** – Blackbaud recommends that VCU utilize Blackbaud's hosting services for both the implementation and production environments of Blackbaud CRM. The fees included in this section are for Blackbaud to set up, test, and host all of VCU's implementation environments for the first 12 months of the project.

After VCU go-live on Blackbaud CRM the annual hosting fees for a multi-tenant environment will be \$80,582 per year and would include (4) environments broken down as follows:

- 1 production environment
- 1 staging environment
- 1 training environment
- 1 test environment

Based upon requirements listed in this RFP VCU may wish to consider our enhanced disaster and recovery services of which details can be found in Appendix VII: Blackbaud Hosting Services – Hosted Customer Disaster Recovery Solutions. The fees for this service would be \$4,321 per month or \$51,852 annually. Our standard disaster recovery offering that is included in the annual hosting fees of \$80,582 may prove sufficient though and we will discuss options with the VCU team to see which option would be the best fit.

**Hardware – N/A**

## 7.3 Tailored, Best Practice Approach Pricing Assumptions

### 7.3.1 Project Management

Blackbaud will assign a project manager that has experience implementing Blackbaud CRM in higher education. This estimate assumes a project manager will be working on the VCU project up to 35% time each month. This also assumes VCU has identified a project manager to work in collaboration with Blackbaud to execute all project management tasks.

### 7.3.2 Data Conversion

- This estimate includes converting data from Millennium to Blackbaud CRM. Assumes VCU will supply data in a SQL database.
- The estimate assumes four (4) conversion iterations prior to Test Run 1. A conversion iteration is considered a preview of a sub-set of data that has been designed and mapped to Blackbaud CRM for use during design and validation sessions. For example, biographical data will be converted followed by revenue and gift related data.
- During the test phase, Blackbaud will convert and modify data for Test Run 2 & Test Run 3. Each test run is accompanied by a user acceptance testing period.

### 7.3.3 Design and Configuration Fundraising Consultant Support

Blackbaud will be supporting the project with consultants that specialize in Blackbaud CRM and Blackbaud Internet Solutions. The consultants will be a combination of fundraising experts that will assist in the design, configuration, testing and deployment of the solution.

- Blackbaud CRM design & configuration includes the following areas. This will include both design and business process walkthroughs and best practice recommendations in each design area.
  - Core Principles (Biographical and demographical data, education records)
  - Revenue Operations
  - Donor Relations & Stewardship
  - Prospect and Campaign Management, Corporate and Foundation Relations
  - Internet Design
  - Annual Giving & Direct Marketing
  - Event Management
  - Membership
  - Security, Reporting & Administration
- Identification of reports and data outputs are identified and discussed in each business process area. Integrations or customizations are discussed and requirements are gathered in context during the business process review.
- This estimate assumes VCU will be implementing Blackbaud Internet Solution, an internet replacement for Harris Connect. Blackbaud is also recommending keeping Blackbaud Luminate Online and Team Raiser online solution for the cancer center walk-a-thon event.

### 7.3.4 Custom Report Support

- While VCU is responsible for all reports or outputs, this allocation is available if VCU chooses to engage Blackbaud to support any of their reporting needs. VCU will be trained on how to extend, add data sources and report off the data warehouse during training.
- Blackbaud has included 400 hours of report support time in the Tailored, Best Practice Approach.

### 7.3.5 Interface Development and Environment Support

- Based the interfaces included in this RFP, the following assumptions were made for interface support however additional discovery around each of these interfaces is recommended.
- Blackbaud approached this estimate by assuming these interfaces will be co-developed. Co-development means VCU will assume responsibility of the interfaces, but Blackbaud will support each interface to provide knowledge transfer and technical support for these interfaces. The following is the amount of Blackbaud support this estimate includes:
  - Student Information System – import of recent graduates, parents and students
  - Paciolan Import and Display of Athletic Information in Blackbaud CRM
  - Grateful Patient Module
  - Interface with Multiple General Ledgers/Financial Systems
  - ImageNow Document Imaging System
  - Other Import Batch Templates
  - Phonathon Integration
  - Single Sign On Support
- Blackbaud has excluded WealthEngine in the interface estimates. Blackbaud assumes VCU will consider Blackbaud's analytics, wealth and prospect research tools.

### 7.3.6 Training

This estimate includes a comprehensive training program that includes 38 days of training to meet the needs of technical staff, report writers, web developers, end users and trainers. Some of the courses do require prerequisite skills; these skills can be provided to VCU in order to ensure staff is trained prior to the implementation. The following are trainings included in this estimate. In addition to these trainings, Blackbaud has included editable courseware and 24/7 access to our online training resources in **Learn CRM**.

- **Project Team Training:** This training is intended to demonstrate Blackbaud CRM and Blackbaud Internet Solutions functionality to project team members in order to better equip the team to effectively design a tailored solution.

- **Online Build Training:** Training is designed to empower VCU with the knowledge and skills necessary to effectively use the online internet solution and its integration points to Blackbaud CRM.
- **Advanced Web Training:** Advanced Web design training includes the HTML, CSS, and design framework of the application from an interactive designer's perspective.
- **Data Warehouse Training:** Data Warehouse training will cover the main components of system usage and basic administration.
- **Customizing the Data Warehouse – ETL Extensions:** This course that will introduce the mechanics of customizing the data warehouse solution. Applications learned in this course would include extending existing data warehouse tables with custom fields, creating new tables, functions, stored procedures and database views.
- **Customizing the Data Warehouse – Advanced:** This course will introduce detailed aspects of the data warehouse extensibility model for ETL processes and the Unified Dimensional Model that involves the customization of the SSAS database.
- **Train-the-Trainer:** Train-the-trainer training equips VCU's trainers and subject matter experts with product knowledge and the necessary skills to effectively transfer that knowledge to all end-users. The training focuses on acquiring software knowledge, knowledge transfer, and teach back sessions.
- **Software Development Kit (SDK) Training:** Blackbaud will provide technical training to VCU on Blackbaud CRM, the Infinity platform, and the Infinity SDK. This training will provide VCU with a solid understanding of the solution architecture of Blackbaud CRM, write customizations and deploy custom code.
- **Page Designer Training:** This training will prepare VCU's technical staff with the tools needed to maintain Blackbaud CRM system functionality and security. This training is also designed to allow developers to further customize and configure the application.
- **Report Writer Training:** Report writer training will consist to training on the transactional database and against the data warehouse. This is assumed SQL Server Reporting Services will be leveraged to build and integrate custom reports
- **Data Output Training:** Participants will learn the variety of tools used to extract data from Blackbaud CRM. These tools are often more cost effective and timely alternatives to report writing initiatives.
- **Editable Workbooks:** VCU receives an electronic copy electronic file (Microsoft Word®) that contains the curriculum source file to print both the facilitator guide and participant guide. This allows VCU to modify, distribute for its own use.
- **Learn CRM:** Blackbaud has included VCU access to its library of self-paced electronic learning. This library can be accessed by end users, 24/7. There are more than 60+ lessons available

## 7.4 Custom Approach Pricing

Custom Implementation Approach Estimated Fees for Virginia Commonwealth University			
Blackbaud Software	Quantity	Rate	Total
CRM System Software	Site License		\$873,540
Additional proposed software modules			N/A
Programming Tools (SDK Support subscription)	3	\$6,000 each	\$18,000
Consulting Services - (includes implementation and integration services)	6740 hours	\$250 – \$225	\$1,610,100
Discovery		Fixed Priced Fee	\$10,000
Conversion	1,600 hours	\$200	\$320,000
Training – On-site	384 hours	\$200	\$76,800
Training – Vendor site			n/a
Training – Materials, courseware		Fixed Priced Fee	\$17,500
Customizations- Packaged		Fixed Priced Fee	\$40,400
First Year Annual Cost of Maintenance and Support (or indicate that the First Year Annual Cost of Maintenance and Support is included in the cost of the System)	N/A	N/A	1 <sup>st</sup> year included in software costs
Travel and Living Expenses – Estimate only			\$144,000
Hosting fees - Blackbaud Hosting fee for pre-production/implementation environments (1 <sup>st</sup> year)	12 Months	yearly	\$54,804
Hardware	N/A	N/A	N/A
The Blackbaud Solution Total			\$3,165,144

## 7.4.1 Pricing Narrative for Custom Approach

**CRM System Software:** Blackbaud CRM pricing listed is based upon a site-license and is a one-time fee.

**Additional Proposed Software Modules:** Blackbaud CRM includes all the core functional areas typically required for a Development and Alumni operation as sophisticated as VCU. Blackbaud CRM also includes our online Blackbaud Internet Solution (BBIS) for online giving, events, membership, mass e-mailing, directories and profile updates. We have listed out in [Section 3: Other Related Goods and Services](#) other subscription services that VCU may want to consider consolidating processes and information into one alumni and development CRM solution.

**Programming Tools:** Blackbaud includes a Software Development Toolkit and the fee listed in this section reflects the designation of three programmers to have access to our SDK support resources to assist with any questions during use of the SDK Toolkit.



**Consulting Services/Discovery:** Each implementation of Blackbaud CRM is unique and tailored for each institution. Details on the custom approach breaking down our estimate by hours and resource is listed in the grid below. For a project of this size and complexity we would typically conduct a discovery phase that would allow us to understand and document in more detail requirements, work effort, assumptions and risks for this project. The outcome of this discovery phase would be a comprehensive scope of work tailored for VCU. The \$10,000 discovery fee is what a typical higher education discovery effort would cost.

Service Description	Rate	Hours	Fee
Engagement Manager	\$250	1,500	\$375,000
Project Advisor	\$250	64	\$16,000
Fundraising Consultant	\$250	1,000	\$250,000
Configuration Consultant	\$225	1800	\$405,000
System Architect	\$250	380	\$95,000
Tech Consultants	\$250	800	\$200,000
Interactive Consultants	\$225	476	\$107,100
Business Intelligence Consultant	\$225	720	\$162,000
<b>Total</b>		<b>6,740</b>	<b>\$1,610,100</b>

**Conversion:** Based upon information contained in this RFP and significant experience in the past with converting from Millennium we estimate that it will take 1,600 hours to fully convert the data in Millennium to Blackbaud CRM. More details around the conversion can be found in [Section 7.5.2: Data Conversion](#).

**Training – On-Site:** Blackbaud has included 384 hours of onsite training for the various users and technical resource on the VCU project. We recommend utilizing a train-the-trainer approach to end-user training with support from Blackbaud training staff. For the more technical topics (report writing, SDK Toolkit etc.) we utilize expert technical staff to train a core technical team onsite at VCU to facilitate knowledge transfer. More details can be found in the grid below and in [Section 7.5.6: Training](#).

Service Description	Rate	Hours	Fee
---------------------	------	-------	-----

Training			
Project Team Training	\$200	84	\$16,800
Train the Trainer Training	\$200	84	\$16,800
Online Build Training	\$200	36	\$7,200
Data Warehouse Training	\$200	24	\$4,800
Report Writer Training	\$200	36	\$7,200
Page Designer Training	\$200	12	\$2,400
Data Output Training	\$200	12	\$2,400
Software Developer Kit Training	\$200	96	\$19,200
Total		384	\$76,800

**Training – Vendor Site:** We find that training is much more effective if conducted at the client's site utilizing your data. As such our proposal includes the bulk of our training onsite at VCU.

**Training – Materials, Courseware:** Blackbaud has included editable courseware called Jumpstart in this proposal. This is what is included in the \$17,500 fee.

**Customizations – Packaged:** Blackbaud has developed pre-built customizations that we have developed to serve the higher education market. These customizations are fixed price and have been included in this section based upon the VCU RFP requirements. They include a Region Code, a Grateful Patient Program and an enhancement to manage more complex Multi-Level Events. After further discussion with VCU we may find that VCU do not need all of these pre-packaged customizations. More detail can be found in the table below around the fees for each solution.

Service Description	Rate	Hours	Fee
Customizations – Packaged			
Region Code Customization	\$5,400	FP	\$5,400
Multi-Level Events Customization	\$20,000	FP	\$20,000

Grateful Patient Customization	\$15,000	FP	\$15,000
Total	\$40,400	FP	\$40,400

**First Year Annual Cost of Maintenance and Support:** 1<sup>st</sup> year of maintenance and support is included in the initial software fees.

Year 2 maintenance fees for VCU would be \$227,700 which would include:

- All upgrades released for Blackbaud CRM
- Support resources including phone and website along with customization and hosting support
- A Technical Account Manager (TAM). The TAM would oversee all VCU support cases and interactions with support and hosting. The TAM would be involved during the first year of the project to gain an understanding of how VCU has set up Blackbaud CRM and use specific to VCU.
- Mass e-mail sending fees that utilizes the tools in the Blackbaud Internet Solution

The annual maintenance fee is calculated as a percentage of the software costs.

**Travel and Living Expenses** (if applicable) – Blackbaud adheres to the federal guidelines on travel expenses for our staff. We have included our travel policy in Appendix V for review. For the purpose of this RFP response we have estimated travel costs which would include hotel, meals and travel for Blackbaud staff assigned to this project.

**Hosting** - Blackbaud recommends that VCU utilize Blackbaud's hosting services for both the implementation and production environments of Blackbaud CRM. The fees included in this section are for Blackbaud to set up, test and host all of VCU's implementation environments for the first 12 months of the project.

After VCU goes live on Blackbaud CRM the annual hosting fees for a multi-tenant environment will be \$80,582 per year and would include (4) environments as follows:

- 1 production environment
- 1 staging environment
- 1 training environment
- 1 test environment

Based upon requirements listed in this RFP VCU may wish to consider our enhanced disaster and recovery services of which details can be found in Appendix VII: Blackbaud Hosting Services – Hosted Customer Disaster Recovery Solutions. The fees for this service would be \$4,321 per month or \$51,852 annually. Our standard disaster recovery offering that is included in the annual hosting fees of \$80,582 may suffice and we will discuss options with the VCU team to see which option would be the best fit.

**Hardware – N/A**

## 7.5 Custom Approach Pricing Assumptions

### 7.5.1 Project Management

Blackbaud will assign a project manager that has experience implementing Blackbaud CRM in higher education. This estimate assumes a project manager will be working on the VCU project up to 55% time each month. This also assumes VCU has identified a project manager to work in collaboration with Blackbaud to execute all project management tasks.

### 7.5.2 Data Conversion

- This estimate includes converting data from Millennium to Blackbaud CRM. Assumes VCU will supply data in a SQL database.
- The estimate assumes four (4) conversion iterations prior to Test Run 1. A conversion iteration is considered a preview of a sub-set of data that has been designed and mapped to Blackbaud CRM for use during design and validation sessions. For example, biographical data will be converted followed by revenue and gift related data.
- During the test phase, Blackbaud will convert and modify data for Test Run 2 & Test Run 3. Each test run is accompanied by a user acceptance testing period.

### 7.5.3 Design and Configuration Fundraising Consultant Support

Blackbaud will be supporting the project with consultants that specialize in Blackbaud CRM and Blackbaud Internet Solutions. The consultants will be a combination of fundraising experts that will assist in the design, configuration, testing and deployment of the solution.

- Blackbaud CRM design & configuration includes the following areas. This will include both design and business process walkthroughs and best practice recommendations in each design area.
- Design sessions will focus on some "As Is" processing and will take into consideration additional design and configuration for modifications to the recommended approach.
  - Core Principles (Biographical and demographical data, education records)
  - Revenue Operations
  - Donor Relations & Stewardship
  - Prospect and Campaign Management
  - Corporate and Foundation Relations (please note: separate design area)
  - Internet Design
  - Annual Giving & Direct Marketing
  - Event Management

- Membership
- Security, Reporting & Administration
- Identification of reports and data outputs are identified and discussed in each business process area. Integrations or customizations are discussed and requirements are gathered in context during the business process review.
- This estimate assumes VCU will be implementing Blackbaud Internet Solution, an internet replacement for Harris Connect. Blackbaud is also recommending keeping Blackbaud Luminate Online and Team Raiser online solution for the cancer center walk-a-thon event.

#### 7.5.4 Custom Report Support

- While VCU is responsible for all reports or outputs, this allocation is available if VCU chooses to engage Blackbaud to support any of their reporting needs. VCU will be trained on how to extend, add data sources and report off the data warehouse during training.
- Blackbaud has included 600 hours of report support time in the Custom Approach.

#### 7.5.5 Interface Development and Environment Support

- Based the interfaces included in this RFP, the following assumptions were made for interface support however additional discovery around each of these interfaces is recommended.
- Blackbaud approached this estimate by assuming these interfaces will be co-developed. Co-development means VCU will assume responsibility of the interfaces, but Blackbaud will support each interface to provide knowledge transfer and technical support for these interfaces. The following is the amount of Blackbaud support this estimate includes:
  - Student Information System – import of recent graduates, parents and students
  - Paciolan Import and Display of Athletic Information in Blackbaud CRM
  - Grateful Patient Module
  - Interface with Multiple General Ledgers/Financial Systems
  - ImageNow Document Imaging System
  - Other Import Batch Templates
  - Phonathon Integration
  - Single Sign On Support
- Blackbaud has estimated additional time to co-develop these interfaces in addition to allowing more effort for advanced configuration and customizations that are beyond interfaces. This assumes VCU will identify approximately 400 hours of additional custom work.

- Blackbaud has excluded WealthEngine in the interface estimates. Blackbaud assumes VCU will consider Blackbaud's analytics, wealth and prospect research tools.

## 7.5.6 Training

This estimate includes a comprehensive training program that includes 38 days of training to meet the needs of technical staff, report writers, web developers, end users and trainers. Some of the courses do require prerequisite skills; these skills can be provided to VCU in order to ensure staff is trained prior to the implementation. The following are trainings included in this estimate. In addition to these trainings, Blackbaud has included editable courseware and 24/7 online training resources with **Learn CRM**.

- **Project Team Training:** This training is intended to demonstrate Blackbaud CRM and Blackbaud Internet Solutions functionality to project team members in order to better equip the team to effectively design a tailored solution.
- **Online Build Training:** Training is designed to empower VCU with the knowledge and skills necessary to effectively use the online internet solution and its integration points to Blackbaud CRM.
- **Advanced Web Training:** Advanced Web design training includes the HTML, CSS, and design framework of the application from an interactive designer's perspective.
- **Data Warehouse Training:** Data Warehouse training will cover the main components of system usage and basic administration.
- **Customizing the Data Warehouse – ETL Extensions:** This course that will introduce the mechanics of customizing the data warehouse solution. Applications learned in this course would include extending existing data warehouse tables with custom fields, creating new tables, functions, stored procedures and database views.
- **Customizing the Data Warehouse – Advanced:** This course will introduce detailed aspects of the data warehouse extensibility model for ETL processes and the Unified Dimensional Model that involves the customization of the SSAS database.
- **Train-the-Trainer:** Train-the-trainer training equips VCU's trainers and subject matter experts with product knowledge and the necessary skills to effectively transfer that knowledge to all end-users. The training focuses on acquiring software knowledge, knowledge transfer, and teach back sessions.
- **Software Development Kit (SDK) Training:** Blackbaud will provide technical training to VCU on Blackbaud CRM, the Infinity platform, and the Infinity SDK. This training will provide VCU with a solid understanding of the solution architecture of Blackbaud CRM, write customizations and deploy custom code.
- **Page Designer Training:** This training will prepare VCU's technical staff with the tools needed to maintain Blackbaud CRM system functionality and security. This training is also designed to allow developers to further customize and configure the application.

- **Report Writer Training:** Report writer training will consist to training on the transactional database and against the data warehouse. This is assumed SQL Server Reporting Services will be leveraged to build and integrate custom reports
- **Data Output Training:** Participants will learn the variety of tools used to extract data from Blackbaud CRM. These tools are often more cost effective and timely alternatives to report writing initiatives.
- **Editable Workbooks:** VCU receives an electronic copy electronic file (Microsoft Word®) that contains the curriculum source file to print both the facilitator guide and participant guide. This allows VCU to modify, distribute for its own use.
- **Learn CRM:** Blackbaud has included VCU access to its library of self-paced electronic learning. This library can be accessed by end users, 24/7. There are more than 60+ lessons available

## 8 Appendix III: Blackbaud Response to Statement of Needs

*This section provides a description of the characteristics, requirements and preferences for the next generation DAR information system at VCU. The selected solution will be a Constituent Relationship Management System (CRM) allowing consistent and comprehensive management of DAR data, web based connectivity, support for role based security, integrated e-commerce and communications, robust end-user tools, and data access needed for reporting and analysis.*

*This document does not describe the entirety of functionality sought by VCU to support Development and Alumni Relations. Those details will be identified during detail project requirement design or "discovery" sessions with the selected vendor.*

### 8.1 Required Features

*Of the design requirements, the following features are **essential required elements** of the next generation DAR information system. The CRM must include the following functionality:*

#	Requirement	Met?	Additional Comments
1.	Web based application, accessible on-campus and off-campus, not restricted by browser type, not requiring any installed plug-ins or other software, and capable of running on a Windows or Apple machine.	Yes	Blackbaud CRM is a web-delivered solution, written in HTML 5. It is accessible from any A-Grade browser, regardless of platform or device type.
2.	Role-based security controls access and permissions model, allowing permissions down to the field level.	Yes	Blackbaud CRM's robust, feature-rich security model is structured by security role, allowing for granular detail and control.
3.	Integration with the university's Active Directory (LDAP) and Jasig Central Authentication Service (CAS).	Partial	Blackbaud is able to integrate with LDAP servers to facilitate user account provisioning and single sign on. Blackbaud has not integrated with Jasig CAS previously. Additional discovery surrounding integration with Jasig CAS is required to determine exact requirements.
4.	Ability to exchange data easily with other applications, such as Banner, Harris Connect, and Financial Edge.	Yes	The Blackbaud Infinity Platform, upon which Blackbaud CRM is written, contains a SOAP web services API to allow for easy exchange of data with other applications such as Banner or Harris Connect. Blackbaud CRM has a standard GL posting file layout for posting to Financial Edge. This proposal does recommend replacing Harris Connect with Blackbaud Internet Solutions.



5.	E-communication functionality	Yes	Blackbaud Internet Solutions (BBIS) has a robust email engine to facilitate e-communications. Pricing for sending mass e-mail is included in the annual maintenance fees in the pricing section.
6.	E-commerce functionality	Yes	BBIS allows for users to register for events, make donations, pay for memberships, etc. If e-commerce is required for purposes of selling merchandise, Blackbaud's Luminate Online solution facilitates e-commerce.
7.	Easy, flexible data-mining and reporting capabilities	Yes	Blackbaud CRM is shipped with a data warehouse and pre-configured OLAP cube to aid in data mining in reporting. The data warehouse may be extended to include data from additional sources, if desired. The OLAP cube may be extended for additional reporting options, as well as reports may be written against the data warehouse for advanced reporting using SQL Server Reporting Services.
8.	Ability to customize application to meet the university's needs without jeopardizing future application upgrades	Yes	The Blackbaud Infinity Software Development Kit (SDK) is delivered with Blackbaud CRM. This allows for ongoing customization. As long as customizations are developed using the SDK and following Blackbaud standards, they are supported during upgrades.
9.	Application programming tools.	Yes	The Blackbaud Infinity SDK may be used to customize the solution extensively as well as write extensions that leverage the built-in API.
10.	Dashboard and analytical functionality	Yes	Blackbaud CRM contains built in configurable dashboards for quick reporting. Additionally, sophisticated analytical tools such as Key Performance Indicators, measuring performance against goals and milestones, are available throughout the system.
11.	Responsive and comprehensive customer support. Customer support should be available 24 X 7 and 365 with first level user support available by telephone or Web, and second-level support for more technical problems.	Yes	Blackbaud has a full-time in-house customer support to team to address standard functionality questions and concerns. Support is available via phone, online chat, Case Central (submit a case online), or Blackbaud's extensive Knowledgebase. A second-tier Developer Support team is available to address more complex challenges associated with solution customization, etc.

## 8.2 Data Needs

*The database must provide great flexibility in capturing and maintaining a large number of attributes about a constituent/donor/prospect. Intelligence must be built into the system to identify key "events" associated with the constituent to drive business decisions and investment of resources. There are many details about data attributes and characteristics needed to determine the overall adequacy of a given DAR information system. The following is not a comprehensive list of those attributes and characteristics; instead this provides a high level starting point in the discussion of the Data component.*

### 8.2.1 Data Entry and Maintenance - General

#	Requirement	Met?	Additional Comments
1.	Alerts and messages. The system shall have configurable alerts and messages that warn operators when some condition exists, such as invalid data that should not be used, so that operators can adjust the data they are entering.	Yes	Blackbaud CRM has a number of pre-defined alerts related to data integrity as well as a number of other alerts that may be configured based upon actions that have taken place within the system or notifications related to specific records. In addition to alerts, Blackbaud CRM allows for notifications that can provide data or alerts via RSS or email notification.
2.	Batch updates and loading utilities. The system shall have batch uploading utilities included that allow batch updates and loading to be done at the application level without additional programming. The utilities should have options to back the data out and cancel jobs if a load fails.	Yes	Data may be loaded in bulk into Blackbaud CRM using batch entry. Data may be validated within batch prior to being written to the database. This review and validation process allows for backing the data out and cancelling a job should it fail, because the batch must be committed prior to the data actually being written to the OLTP tables.
3.	The system must utilize role-based permissions for data select, insert, edits and deletes. The system should be able to restrict data access based on criteria, e.g., only one unit can see details on an anonymous gift from a Dean; a major gifts strategy or proposal recorded by one departmental fund raiser should not be visible to other departments without permission.	Yes	Blackbaud CRM has three different types of security. - Role-Based – User security that governs what a user can and cannot do (view, edit, add, delete, etc.) - Site – Allows for tagging records with a specific site and security may be applied on a site-specific basis (e.g. A user may only see records for a certain site or they may be able to edit records for Site A, view site B, and has no knowledge of records for site C, etc.) - Constituent – Constituent security allows users to tag certain constituents with a specific security group, which provides for special handling and record control of those constituents (e.g. VIPs, Trustees, etc.) Combined, these three security elements will sufficiently meet VCU's requirements.

4.	Batch entry of gifts and biographical data must be available with default settings, control totals, and manual override. The system must support supervisor control of batches, such that batches must be reviewed and approved before they can be posted into the system.	Yes	Blackbaud CRM batches start from a template; where field-specific settings are defined such as required fields, default values, and hidden values. Batch entry supports control totals as well as a workflow to facilitate required steps for batch entry, including validation and approval, prior to a batch being committed and records created or updated.
5.	Ability for quick repetitive data entry should be available. For example, 100 entities that need to have the same event attendance assigned or 100-payroll deduction pledges to a faculty/staff campaign.	Yes	The ability to simultaneously update records or establish defaults to expedite gift entry may be achieved in a variety of methods within Blackbaud CRM, depending upon the type of data that is being entered. Examples include global change, batch updates or business processes that include these types of entry changes.

## 8.2.2 Biographical Data

#	Requirement	Met?	Additional Comments
1.	Must have the ability to accommodate multi-tiered academic information for alumni. Alumni are defined as degree holders. Required attributes include:	Yes	Blackbaud CRM has first class fields for education records to track both VCU-issued degrees as well as degrees issued by other institutions that are tracked for informational purposes.
	a. Major	Yes	Blackbaud CRM education records track all affiliated information related to a degree and academic program.
	b. Program within major	Yes	Blackbaud CRM education records track all affiliated information related to a degree and academic program.
	c. Concentration within major	Yes	Blackbaud CRM education records track all affiliated information related to a degree and academic program.
	d. Academic interest information. e.g. student receives an MBA from the evening MBA program with a concentration in Finance and has an interest in venture capital	Yes	Blackbaud CRM education records track all affiliated information related to a degree and academic program.
	e. Scholarships, honors, and other awards	Yes	Blackbaud CRM education records track all affiliated information related to a degree and academic program, student involvements, honors, scholarships,

			and awards.
2.	Must have the ability to store and maintain alumni activity, affiliations, awards, constituent societies, chapters and membership including date fields for all.	Yes	Blackbaud CRM was built with a focus on higher education institutions. There are a variety of ways to track alumni details, depending upon the type of information that needs to be tracked. All of the requirements listed are standard elements that are routinely tracked in Blackbaud CRM by our higher education customers.
3.	Must have the ability to track academic medical center patient information compliant with HIPPA restrictions.	Yes	Blackbaud has developed a standard packaged customization to Blackbaud CRM for organizations that require tracking patient information for fundraising purposes. It was developed based upon the changes made in 2013 related to HIPAA and allowable PHI for fundraising purposes. This customization is part of this Blackbaud response.
4.	Must have the ability to track relationships for non-entities (where the person is not set up in the database). For example, we want to track the names of a donor's children but do not necessarily wish to set up all of the children in the database.	No	All individuals, organizations, groups, or otherwise are considered constituents within Blackbaud CRM and will have a constituent record. However, records such as those described are flagged as "relationship only" making them easy to exclude from reports, queries, searches, etc.
5.	Must have the ability to track constituents' academic history, including but not limited to:	Yes	Blackbaud CRM has first class fields for education records to track both VCU-issued degrees as well as degrees issued by other institutions that are tracked for informational purposes.
	a. VCU and other university degrees	Yes	Blackbaud CRM has first class fields for education records to track both VCU-issued degrees as well as degrees issued by other institutions that are tracked for informational purposes.
	b. Graduation year	Yes	Tracked within Blackbaud CRM as a first class field independently for each degree earned.
	c. School or college attended	Yes	Tracked within Blackbaud CRM as a first class field independently for each degree earned.
	d. Preferred reunion year, if different from graduation year	Yes	Tracked within Blackbaud CRM as a first class field independently for each degree earned.
	e. Transfer student information	Yes	Details of the transfer may be tracked on the education record.
6.	Must have the ability to track student interests	Yes	Blackbaud CRM is a comprehensive constituent

	and activities, scholarship recipients and awards and ability to link to parent data and every facet of the student relationship while at Virginia Commonwealth University.		relationship management solution that is designed to track all facets of the constituent relationship for higher education advancement functions, such as those of the Development and Alumni Relations teams at VCU.
	a. Ability to import/leverage data from the athletic ticketing system, Paciolan.	Yes	There are a variety of ways in which customers have elected to import data from Paciolan to surface it to users. Many customers are leveraging data from Paciolan. Blackbaud will work with VCU to determine how they wish to leverage the data and then from that response determine the best manner in which to import and display the data within Blackbaud CRM.
	b. Ability to import/leverage data from cancer center walk-a-thon system, Convio.	Yes	Blackbaud acquired Convio in May 2012. We are currently in the process of developing standard product integration between the two solutions so that data seamlessly is displayed in Blackbaud CRM from Convio Luminate Online and TeamRaiser.
	c. Ability to import data from other campus systems using Excel worksheets, csv file formats, or other industry standard formats.	Yes	A front-end import tool is available for importing data into Blackbaud CRM contained in flat files such as those examples listed here.
7.	Must have the ability to track constituent's career and employment history, and relationship to corporate and organizational records.	Yes	A complete employment history is formed for a constituent as relationships with individual employers are tracked over time.
	a. Ability to link to the employer record, with hyperlink to employer web site.	Yes	When a relationship is added, a link is automatically generated to link to the organization's constituent record. Each organization record stores a URL for the company which allows for single click access to the employer website.
	b. Accommodate job titles including an adequate job title field length for extremely long job titles.	Yes	A job title field is prominently placed on each employer relationship, which is 100 characters in length.
	c. Accommodate standard occupation and industry codes, e.g., DUNS, FEIN, etc.	Yes	Industry is a standard field available on every organization record.
	d. Accommodate a relationship hierarchy for employer organization such as matching gift contacts, corporate agents and other relationships that might exist between individuals and organizations	Yes	Blackbaud CRM classifies key individual relationships at employers as organization contacts. Each contact has a specified contact type, making it easy to know whom to contact within each organization for a specific reason.
	e. Ability to record and track an individual's	Yes	A complete employment history is available on an

	related professional development, position changes, and other activities that reflect an individual's complete relationship with an organization.		individual's constituent record, showing both career progressions within an individual employer but also history across multiple employers.
	f. Ability to store multiple employers for a constituent with start and end dates. There should also be classifications for position levels in an organization and other employment attributes.	Yes	A complete employment history is available for individual constituents showing their dates of employment, position, classification, job title, etc.
8.	Must have the ability to code "deceased" constituent records	Yes	There is a built-in workflow, with access controlled by security, to mark a constituent deceased and ensure that the record is updated accordingly.
	a. Ability to reverse erroneously "deceased" constituent records to living status	Yes	There is the ability to un-decease a record that is erroneously marked as deceased.
	b. Automatically:		
	i. retire current affiliation relationships	Yes	A standard workflow when a record is marked as deceased facilitates this action.
	ii. retire joint handling codes, e.g., joint mailing, joint salutations	Yes	A standard workflow when a record is marked as deceased facilitates this action.
	iii. change honor roll names from joint to individual	Yes	A standard workflow when a record is marked as deceased facilitates this action.
	iv. change related individuals' status, e.g., spouse becomes widowed, divorced, etc.	Yes	A standard workflow when a record is marked as deceased facilitates this action.
	c. Ability to alert system users, based on DAR business rules, when records are "deceased".	Yes	Notifications and alerts may be delivered to users in a variety of ways including an on-screen list which is reviewed, a pop-up notification when accessing a record, an RSS feed pushing an alert to a user, or an email sent to a user.
	d. Adaptations in functionality to "decease" corporate and organizational records.	Yes	Functionality exists to mark organization records inactive when they are no longer valid, as well as there is built-in functionality to manage organization acquisitions and mergers.
9.	Must have the ability to merge constituent records and, based on DAR business rules, automatically:	Yes	Records may be merged one-off or on a systematic basis if the match threshold exceeds a standard defined by VCU.

	a. combine gifts and pledges including the handling of matching gifts	Yes	Gift data is automatically merged, along with outstanding matching gift claims.
	b. combine relationships	Yes	Relationships are automatically merged with business rules to manage what should happen in the event of a possible duplicate relationship because it existed on both records.
	c. merge joint handling codes, e.g., joint mailing, joint salutations	Yes	Joint name formats will automatically be updated based upon the details contained on the merged record.
	d. merge related individuals' status, e.g., spouse becomes widowed, etc.	Yes	Statuses will automatically be updated based upon the business rules as defined in the merge configuration settings.
	e. Merge utility should be graphical and allow the online selection of information to be merged and what information should not be merged.	Yes	Merge configurations allow for configuration settings to determine how information should be merged in the event of conflicts and what should/shouldn't be merged. There is also a utility to manage conflicting information when a possible duplicate is identified at the point of data entry.
10.	Must have the ability to handle all names, salutations, joint names through multiple name types, and multiple salutations based on DAR business rules.	Yes	Constituent records may have an unlimited number of name formats, driven either through formulas or free text.
	a. Joint names should be automatically updated on both constituent records, determined by business rules, relationship codes or some other method in order to reduce errors.	Yes	Joint name formats are formula-based so the name format is automatically updated on both records when a spouse is added.
	b. Ability to overwrite salutation logic	Yes	Free-form name formats may be added at any time.
	c. Ability to store multiple name types such as names(s) whole enrolled and birth name	Yes	An unlimited number of name formats, classified by type, may be associated with a constituent record.
	d. Ability to use multiple names from the same household if both are qualified for a given mailing.	Yes	Name format rules allow for how mailings should be sent – one per household, one for each qualifying member, etc. as well as how they should be addressed in terms of which name format to use, which name should be listed first, etc.
	e. Ability to sort husband/wife together on a list even though last names are different.	Yes	Lists may be sorted in a variety of different ways depending upon the desired output, including sorting

			spouses together.
11.	Must have the ability to handle multiple address types (including international constituents) such as home, business, preferred, seasonal and others.	Yes	Blackbaud CRM supports an unlimited number of address formats on a constituent record.
	a. Mailing preferences stored by address type. For example, send all my Athletic mail to my business, but send my other mail to my home.	Yes	Mail preferences allow you to designate how a constituent wishes to review a specific type of communication and more specifically to which address if there are multiple email addresses or mailing addresses on a constituent record. These may be updated by staff manually or by the constituent themselves online.
	b. Data entry staff should have the ability to change preferred address type codes without having to delete and re-enter an address.	Yes	Any address may be designated as a preferred address simply by marking the "preferred" checkbox. There is no need to re-enter an address to make it preferred.
	c. Assign address to a region code based on zip code	Yes	Blackbaud includes a standard customization for higher education customers that assigns a region code based upon different characteristics, including zip code. You may have different types of region classifications (e.g. alumni, fundraising, etc.) with different region coding within each classification.
12.	Must have the ability to store:		
	a. Gender code/description	Yes	All individual records may have a gender classification.
	b. Birth date (allow for partial date), birth source	Yes	Allows for specific and fuzzy dates. Birth source may be tracked as an attribute.
	c. Deceased date (allow for partial date), deceased source	Yes	Deceased date, source, and confirmation status are all standard fields.
	d. Spouse ID, marital status and/or partner code	Yes	Standard functionality to add a spouse record and track relationship status.
	e. Ethnic code	Yes	Standard functionality exists to track based on user defined code table entries.
	f. Citizenship, Visa type	Yes	Constituent attributes allow for tracking details such as this that don't have a first class field already. Or, if VCU elected to do so, a first class field could be



			added to track this information using the SDK.
13.	Must have duplicate checking. The system should have an algorithm that will check for duplicates when entity records are created and provide a warning to the data entry operator.	Yes	Blackbaud CRM has robust functionality that aids in the identification of potential duplication records at the time of entry and a means for updating data systematically if it differs from the information already on the existing record.
14.	Must have the ability to code and restrict confidential, FERPA and HIPPA protected information to isolate access privileges between data entry and data inquiry.	Yes	Blackbaud CRM's security model provides robust functionality to control access to records to protect confidential information. Depending on the data that needs to be restricted, a custom field may need to be created to allow security to be placed on the specific field. In other cases an entire form may be sufficient for security.

### 8.2.3 Fund Data

#	Requirement	Met?	Additional Comments
1.	Must have the ability to create fund records with	Yes	Fund records are standard within Blackbaud CRM.
	a. start/end dates	Yes	Each fund may have a distinct start and end date.
	b. multiple associated general ledger chart fields	Yes	General ledger mapping in Blackbaud CRM is structured differently than Banner, eliminating the need for multiple GL chart fields to be tied to a fund. The GL model within Blackbaud CRM will exceed VCU's needs.
	c. Foundation or bank account associated with the fund (where to deposit)	Yes	May be tracked as an attribute.
	d. Banner financial system account codes	Yes	GL account mapping is built within a dedicated functional area within Blackbaud CRM.
	e. fund purpose (multiple allowed)	Yes	Multiple fields exist to track this already however if additional are required attributes may be used.
	f. fund type, e.g., current use, endowment, etc.	Yes	Standard functionality is provided to track this and mapped accordingly for VSE reporting.
	g. gift fee rules/formulae	Yes	May be tracked in narrative form on the fund. Gift fees are designed in Blackbaud CRM to calculate a percentage or dollar amount on each transition to be

			allocated or expensed to a specific college/unit.
	h. campus organizations for distribution and reporting (e.g., department/program, division, school/college, administrative organization)	Yes	Tracking these details on a fund is standard.
	i. fund status, e.g., active, inactive, closed	Yes	Fund status is standard functionality.
	j. administering organization	Yes	There are a number of ways upon which this may be tracked on a fund. The approach to accommodating multiple general ledgers may include separate ledger configurations in Blackbaud CRM or GL coding that will allow transitions to be identified and classified to the correct GL. The final approach will be determined during solution design.
	k. benefiting organization (multiple allowed)	Yes	There are a number of ways upon which this may be tracked on a fund. The approach to accommodating multiple general ledgers may include separate ledger configurations in Blackbaud CRM or GL coding that will allow transitions to be identified and classified to the correct GL. The final approach will be determined during solution design.
	l. distribution ratios for funds with multiple benefiting organizations	Yes	Organizations who have interdisciplinary funds track this in their financial system or as a distribution ratio on the Fund record in Blackbaud CRM. Depending on the extent of the ratios and how the organization needs to report and allocate the funds, a customization may be required.
	m. fund coding for inclusion in required reporting, e.g., to the Office of the President, CASE, CAE and other organizations	Yes	Blackbaud CRM is utilized by many higher education customers with complex fund reporting requirements.
	n. fields (text, numerical, dropdown tables) available for custom purposes	Yes	There are a large number of fields provided for reporting to support VCU's needs. If a standard field does not apply, attributes may be used.
2.	Must have the ability to link scanned documents related to the fund. VCU currently uses ImageNow for scanning and storing.	Yes	Blackbaud CRM provides for adding documents directly onto the documentation tab of a wide range of records as attachments. Additionally, many Blackbaud CRM customers have elected to utilize a third party document management solution for storing documents. One Blackbaud CRM customer is currently developing a customization for utilizing ImageNow as an integrated document management solution within Blackbaud CRM. Integration to

			ImageNow has been included in the pricing response.
3.	Should have the ability to link associated funds, e.g., a donor may give to an endowment, then give to a current account to supplement the award until the endowment earnings are sufficient; or a current memorial fund may become an endowed fund when certain minimum criteria are met. If the current memorial fund is then deactivated, it would be useful to see a link to the endowed fund.	Yes	Standard functionality – the manner in which Blackbaud CRM funds are built allows for associating funds together to support the example stated.
4.	Should have the ability to code funds to accommodate campus wide reporting needs such as classification of funds for capital projects and other similar elements requiring complex structures for cash flow reporting and management.	Yes	Funds may be classified and coded in a variety of ways to support a range of campus-wide reporting needs.

## 8.2.4 Tools and Services/Data Quality and Enrichment

#	Requirement	Met?	Additional Comments
1.	Must have the ability to integrate with various vendors to perform NCOA, CASS, lost alumni, and e-mail append screening services.	Yes	Blackbaud has data enrichments services to perform many of these services and the data updates are seamlessly brought into Blackbaud CRM. These are subscription services and pricing is determined by frequency and size of the file that is being updated or screened. Additionally, Blackbaud CRM customers also contact with additional vendors to provide these services and updates can be brought into Blackbaud CRM through the solution's import tool.
2.	Must have the ability to receive updated zip code, county, city and state information from the USPS or equivalent service.	Yes	Blackbaud recognizes that address data changes routinely, and through our data enrichment services we are able to systematically update the types of data specified. These are subscription services and pricing is determined by frequency and size of the file that is being updated or screened. In addition, data may be updated through our update batch mechanism to update specific data fields on existing addresses, etc.
3.	Must have the ability for area code update services (area codes added/split, etc.)	Yes	Data may be updated in a systematic fashion to reflect these types of changes.
4.	Must have the ability to keep transactions static after posting; should create reversing transaction	Yes	Blackbaud CRM contains a full audit of all changes to a transaction; as well as for revenue transactions a

	adjustments not change original.		formal adjustment process is followed whereby a transaction reversal and adjustment is posted. The GL timeline shows the entire GL posting history from the time of the original post, and incorporates all reversals and adjustments.
5.	Must have the ability to save email into the application as contact history from Google Mail and from mobile devices.	Partial	Data may be saved from mobile devices by copying and pasting the content of the message and adding it as a constituent interaction. Blackbaud has developed, and our customers have enhanced, a freeware solution available from the Blackbaud Developer Network that may be installed for Microsoft Outlook that allows for one-click adding of an email message as a constituent interaction. If Google Mail is accessed via Microsoft Outlook, this could be leveraged to achieve the desired result.
6.	Must have the ability to import gift data securely from third parties. We currently import data from Harris Connect, WorldPay / Authorize.net (online giving), Convio, and SunTrust Bank (deposits).	Yes	Blackbaud CRM has a first-class import tool that all Blackbaud CRM customers are leveraging to import gift data from third party sources. The need to import bank or credit card transactions should be eliminated if Blackbaud Internet Solutions is used in addition to standard EFT/ACH processing. Likewise if VCU implemented Blackbaud's Internet portion of CRM then importing data from Harris Connect would be removed.
7.	Should have the ability to integrate wealth screening web tools and data from leading vendors such as Wealth Engine	Yes	Blackbaud CRM is used by a number of Blackbaud customers to surface data obtained through Wealth Engine searches. A custom import is required to import this data but has previously been developed so is able to be re-deployed for customers requiring this functionality. For an additional fee, Blackbaud also provides comprehensive wealth and prospect screening tools through Blackbaud Target Analytics that is automatically integrated and available in Blackbaud CRM. We have included pricing for some of our Target Analytics services in section 3.0 Other Related Goods.
8.	Should have the ability to interface with direct mail vendors.	Yes	Blackbaud CRM contains the Blackbaud Direct Marketing toolset built in to the solution. This toolset provides for sophisticated segmentation and analysis of complex multi-channel campaigns. Many Blackbaud CRM customers provide direct mail vendors access to this toolset through a limited security role because vendors are able to complete their work directly within Blackbaud CRM and it eliminates the need for exporting and importing sets of data.

9.	Should have the ability to automatically generate alerts based on business rules (example: notify Development Officer when a pledge is about to be written off).	Yes	Blackbaud CRM has a variety of mechanisms in place to notify users of actions that have taken place or may be about to happen. Examples include email alerts; RSS feed push notifications, and on-screen lists of qualifying records (e.g. new gifts, clearance approved, etc.)
10.	Should have the ability to see who made any given edit, what changed on the record, etc.	Yes	All inserts, updates, and deletes are tracked in audit tables and on key records (constituents and revenue) a history report is made available to show all changes made to the record in a user-friendly manner.
11.	Should have the ability to send pledge and membership reminders through email	Yes	The fully integrated solution with Blackbaud CRM and BBIS allows for using the BBIS email engine to send outbound communications based upon Blackbaud CRM behaviors. Constituents may indicate their preferences for receiving these types of communications and the system will ensure that their preferences are preserved.
12.	Should have the ability to interface with corporate gift matching policy update services such as HEP and CASE.	Yes	Blackbaud has a service, Match Finder, which provides this data. If a customer wishes to use an alternative solution, an integration may be built using the API to propagate the data within the database on the constituent record.
13.	Should have the ability to interface with commonly used planned giving software, such as PG CALC.	Yes	Blackbaud has a partnership with PG Calc and illustrations may be imported using the out of the box integration tools into Blackbaud CRM and auto-populate fields on the planned gift record.

## 8.2.5 Data Manipulation

#	Requirement	Met?	Additional Comments
1.	Must include flexible tools to load new records into the system or to append or modify data on existing records.	Yes	Records may be added or edited either one-off or in a batch format for more systematic updates.
2.	Must include tools to merge duplicate records.	Yes	The Blackbaud CRM constituent merge functionality is highly flexible and robust.
3.	Data manipulation tools should, at the discretion of the user, automatically apply the business rules of the application to imported data.	Yes	Business rules are applied automatically to imported data to preserve data integrity.

4.	Should log the activity and use of its data manipulation tools.	Yes	All user activity within the solution is tracked and able to be monitored and reported on.
5.	Should include tools to take snapshots of transactional data, and has the ability to schedule the snapshots.	Yes	The Blackbaud CRM solution does not take snapshots of the transactional data however the way in which the solution was built allows for detailed point-in-time reporting, eliminating the need for snapshots. Additionally, the data warehouse delivered with Blackbaud CRM further provides the ability to report and conduct analysis at a point in time. Blackbaud has worked with a number of customers leveraging Millennium and the need for snapshots results from the data architecture of the Millennium solution; the need for snapshots has been eliminated upon conversion to Blackbaud CRM.
6.	Should include tools for building and/or supporting a reporting data mart.	Yes	Blackbaud CRM comes with a data warehouse and pre-built OLAP cube for reporting purposes. This may be extended as needed, including the inclusion of data from third party sources, to aid in reporting.
7.	Should be able to perform incremental builds of data marts based on changes in the database.	Yes	Blackbaud CRM's ETL process may either run an incremental or full build, depending upon what is desired.
8.	Data mart tool should be able to automatically apply the business rules of the application to summarize exported data.	Yes	The standard business rules applied to all data within Blackbaud CRM carry forward as the data is moved into the Data Warehouse.

## 8.2.6 Data Interfacing and Reconciliation

#	Requirement	Met?	Additional Comments
1.	Must include flexible tools to load new records into the system or to append or modify data onto existing records.	Yes	Records may be added or edited either one-off or in a batch format for more systematic updates.
2.	Must record either debits and credits or positive/negative transactions. No absolute value.	Yes	All revenue transactions will post with the appropriate credit/debit combination. Blackbaud CRM does not allow for negative transactions. Any adjustment will result in the appropriate reversal GL distribution.
3.	Must not allow backdating of postdate information. Application must not change dates of prior activity based on current activity.	Yes	Once a period is closed transactions may not be posted in that prior transaction. No prior dates on a transaction will be changed based upon current activity.

4.	Data manipulation tools should be able to automatically apply the business rules of the application to imported data.	Yes	Business rules are applied automatically to imported data to preserve data integrity.
5.	Should log the activity and use of its data manipulation tools.	Yes	All user activity within the solution is tracked and able to be monitored and reported on.
6.	Should include tools to take snapshots of transactional data that can be recreated at any time.		The Blackbaud CRM solution does not take snapshots of the transactional data however the way in which the solution was built allows for detailed point-in-time reporting, eliminating the need for snapshots. Additionally, the data warehouse delivered with Blackbaud CRM further provides the ability to report and conduct analysis at a point in time. Blackbaud has worked with a number of customers leveraging Millennium and the need for snapshots results from the data architecture of the Millennium solution; the need for snapshots has been eliminated upon conversion to Blackbaud CRM.
7.	Interfacing		
	a. Account numbers on system must be able to correlate with account numbers in five affiliated foundations (dissimilar numbering methods)	Yes	Blackbaud CRM supports posting to multiple charts of accounts with different account formats.
	b. Application must be able to locate constituent using ID numbers stored from multiple other systems such as the student system, athletics ticketing system, and VCUHS Cerner patient information system.	Yes	Blackbaud CRM is able to store multiple alternate constituent ID numbers with each being identified with a specific type.
	c. Application should be able to exchange data with hosted applications such as Convio and Harris Connect.	Yes	Blackbaud acquired Convio in May 2012 and is in the process of building productized integration to integrate the Luminate Online and TeamRaiser solutions to Blackbaud CRM. For integration with Harris Connect, customers may import/export flat files or build integration through Blackbaud's web services API. Blackbaud recommends that VCU utilizes Blackbaud Internet Solutions, our online component for CRM to replace Harris Functionality.
8.	Should be able to interface with social media sites such as LinkedIn.	Yes	Blackbaud has a formal partnership with LinkedIn. At the present time we are able to capture the LinkedIn profile URL on a constituent record and know that a constituent has joined the official LinkedIn alumni group for VCU. We are actively working with LinkedIn to expand our partnership in hopes of being able to

			exchange employment information, etc. however we are bound by the privacy policies established by LinkedIn.
9.	Reconciliation		
	a. Must be able to reconcile On-line giving credit card confirmation number with gift record and with payment gateway records	Yes	Blackbaud CRM stores the appropriate data to facilitate credit card reconciliation. If VCU elects to process credit cards through Blackbaud Merchant Services, functionality is currently being developed to simplify the reconciliation process.
	b. Should be able to easily reconcile subsidiary ledger (cash receipts/pledges) to general ledger.	Yes	The posting process and associated reports provide for a simplified method of reconciling transactions to the general ledger.

## 8.2.7 Organization Data

#	Requirement	Met?	Additional Comments
1.	Must have the ability to link all parts of an organization, including corporate headquarters, parent company, subsidiaries, regional branch offices, divisions, holding companies, and corporate foundations.	Yes	Blackbaud CRM actively builds out a corporate hierarchy as relationships are established between corporate entities. This hierarchy facilitates rapid reporting of revenue, prospect relationships, employee constituent counts, etc.
2.	Must have the ability to track point of contact within organization without having to create separate record.	No	Organization contacts require a unique constituent record that is related back to the organization, however each contact is coded in such a way to easily exclude them from reports, queries, etc.
3.	Must have the ability to pull linked organizations into one comprehensive report to see entire corporate relationship with VCU.	Yes	The report is created automatically as the corporate relationships are added, making it easy to view the entire corporate relationship with VCU.
	a. Ability to track executives and their personal giving record along with corporate history and giving record.	Yes	Executives will have their own individual record to track their giving history but will be linked to the organization through relationships, allowing for the viewing of individual giving in the context of the corporate relationship.
	b. Ability to track all corporate volunteer information along with total personal and organizational giving history.	Yes	Volunteer activities are tracked at the individual level and may be aggregated at the corporate level as long as the employees have a relationship to the corporation.



	c. Ability to track available alumni and parent employment information.	Yes	As the employment relationship records are added to the individual constituents, the results are aggregated into a report, showing, for example, how many alumni constituents are employed by each node of the corporate hierarchy.
	d. Ability to track named funds, spaces, programs from any sector of the corporation past or present version.	Yes	Blackbaud CRM has standard functionality to track naming opportunities, named funds, etc. As the corporate entity is affiliated with these, they are quickly linked to the fund or opportunity, making it easy to see the totality of the corporation impact from their constituent record.
	e. Ability to track merger or defunct dates of corporation.	Yes	Blackbaud CRM has standard functionality to manage corporate mergers and acquisitions.
4.	Must have the ability to track foundations by type, e.g. independent, family, donor advised fund or corporate.	Yes	Foundations may be coded in any variety of ways to facilitate required reporting.
5.	Must have the ability to track the following types of corporate data:		
	a. Procurement	Yes	Procurement policies may be tracked as attributes or in a notepad.
	b. Grants and contracts	Yes	Grants received from the organization will be tracked as gifts and coded accordingly to facilitate reporting of grant revenue.
	c. Sponsorships	Yes	Sponsorships received from the organization will be tracked as gifts and coded accordingly to facilitate reporting of sponsorship revenue.
	d. College/center/faculty interactions	Yes	Interactions may be tracked on the constituent record and coded in a variety of ways to identify which college, etc. the interaction took place with.
	e. Research/patent linkages	Yes	Research/patent linkages may be tracked as attributes or in a notepad.
	f. Recruiting, Internships/cooperative education	Yes	Individuals that receive internships from the corporation will be tracked using relationships.
	g. Matching gifts	Yes	Each organization record has a matching gift component to track the requirements for matching gift

			programs as well as all matched gifts are quickly and easily viewed from the organization record.
	h. Advisory Boards and Special Affiliations	Yes	All advisory boards and special affiliations to which the organization belongs will be tracked as relationships or group memberships on the constituent record.
	i. Facilities/equipment	Yes	Facilities named or equipment donated will be associated as revenue and coded accordingly to facilitate reporting.
	j. Job placement of VCU graduates	Yes	As VCU graduates are employed by the organization an employment relationship will be added making it easy to report on the number of VCU graduates employed with the company, etc.
6.	Must have the ability to generate a "tree view" of corporate data	Yes	The "tree view" is automatically formed as relationships are created between corporate entities.
7.	Should have the ability to see historical view of an organization before a merger, example: legally gave \$100,000 as Company 123 merged to Company XYZ.	Yes	When corporations are merged, the previous history as the individual entity is maintained, with all new activity distinctly identified with the organization post-merger.
8.	Should have a matching gift screen that can link to vendor that provides corporate matching gift information updates (restrictions, limits, and rules).	Yes	Blackbaud CRM has the ability to code an organization as a "matching gift organization" where details about their matching programs may be stored.
9.	Should have the ability to track SIC identification code for type of corporation, taking into consideration that some corporations have multiple codes.	Yes	Industry codes are able to be stored on organization records.
10.	Must have the ability to track foundations by type, e.g. independent, family, donor advised fund or corporate.	Yes	Foundations may be coded in any variety of ways to facilitate required reporting.

## 8.3 Operational Needs

### 8.3.1 Gift Administration

#	Requirement	Met?	Additional Comments
---	-------------	------	---------------------

1.	Must have the ability to manage varied degrees of anonymous gifts:	Yes	Blackbaud customers routinely have a need to manage anonymous gifts in a variety of ways and Blackbaud CRM can accommodate them as required.
	a. Completely unknown donors	Yes	An "Unknown Donor" constituent record is typically created and revenue recorded against this constituent to track truly unknown donors.
	b. Known donors who want their gift to be completely confidential beyond the required gift acceptance staff involvement	Yes	Blackbaud has designed a business process to capture these gifts within Blackbaud CRM and code them accordingly to respect the donor's request for anonymity.
	c. Known donors who want limited confidentiality, e.g., a faculty member who doesn't want his department to know that he is the donor to their laboratory facility	Yes	Gifts may be coded in such a way that the view is limited from specific groups of users to protect the donor's request for anonymity.
	d. Known donors who do not mind that that campus knows, but who do not want public acknowledgment, e.g., honor rolls, etc.	Yes	An anonymous flag may be added to individual gifts or the donor, which prevents their gifts from being publically reported upon.
2.	Must have the ability to manage multiple, complex pledges:	Yes	A constituent may have any number of pledges.
	a. If a donor has one or more open pledges, the open pledges are displayed during gift entry	Yes	All open pledges will be displayed to a data entry clerk during gift entry to ease payment/pledge linking.
	b. Ability to enter and track a conditional pledge with special circumstances.	Yes	Pledges may have a subtype to code them. A common subtype for Blackbaud CRM customers is "conditional pledge".
	c. Ability to suppress conditional pledges from reporting	Yes	Pledges with the subtype of "conditional pledge" may easily be excluded from reporting.
	d. Ability to enter an editable pledge payment schedule based on payment frequency and date criteria	Yes	Blackbaud CRM supports a wide range of payment schedules from those on a routine schedule to those on a completely unique and irregular schedule.
	e. Pledge split to multiple accounts	Yes	Pledges may be split in an unlimited number of ways.
	f. Ability to adjust pledge amount or payment schedule without deleting entire pledge payment history, e.g., cancelled or written-off pledges, while maintaining an audit trail and	Yes	Pledges may be adjusted without any modifications to previously applied payments. An audit trail is maintained for all changes to a pledge. Pledges may be adjusted one-off or in a systematic fashion using

	allow options for manual adjustment option for single record or batch adjustment option to reverse pledge entries by date		the revenue update batch.
	g. Ability to reinstate a written off pledge should the donor decide to make payments	Yes	A pledge write-off may be removed from a pledge so that it may be reinstated.
3.	Must have the ability to generate pledge reminders (paper and email) on schedule requested by donors such as monthly, quarterly, annually, irregular and also manual reminders. Ability to record in system when the reminder was sent, method (email, USPS), and to what address.	Yes	Blackbaud CRM supports pledge reminders sent via email or mail, according to the donor's preference. Further, the preference may allow for specification of which address or email address the donor wishes to receive the communication.
4.	Must have the ability to generate receipts for gifts	Yes	Receipts may be sent for all eligible gifts from within Blackbaud CRM.
	a. Receipts can reflect and distinguish between tax deductible contributions and nondeductible benefits	Yes	If a gift has benefits associated, the receipt amount is automatically reduced to preserve quid pro quo and properly receipt the gift for the appropriate amount.
	b. System can generate a single receipt for a gift with multiple designations detailed	Yes	Receipts may incorporate any number of designations or splits for a gift.
	c. Receipts can be generated by gift batch	Yes	Receipts may be generated and grouped in any manner decided by VCU.
	d. Receipts can be generated manually for a specific transaction	Yes	Receipts may be generated one-off when necessary.
	e. Receipts can be scheduled on an annual basis. For example a donor who makes monthly payments (such as payroll deduction) should be able to choose an annual receipt.	Yes	Receipts may either be sent on a consolidated basis at a schedule to be determined or individually on a per-transaction basis.
	f. Receipts should have the ability to have descriptive data added where appropriate, such as the description of a gift in kind, possibly an appraiser, and details of stock shares received or other information.	Yes	Receipts have robust detail that may be included depending upon VCU's needs. All details of a revenue transaction may be included in a receipt if desired.
	g. Receipt format may be customizable to allow for central production of receipts for multiple foundations, branded for multiple units with the "look and feel" of the unit	Yes	Blackbaud CRM provides the data for receipts but receipts may be printed in any format desired by VCU.

	h. Receipts should also be able to be selected by a media type based on donor preferences. For example a donor may wish to receive an e-receipt only.	Yes	Donors may indicate their preference for how they desire to receive receipts.
5.	Must have the ability to handle centrally processed gifts with a decentralized acknowledgment strategy:	Yes	Acknowledgment processes are unique to the unit to where the gift is designated, if desired.
	a. Acknowledgement letters can be assigned during gift entry	Yes	A single letter or multiple letters may be assigned to a gift during gift entry.
	b. Acknowledgment letters can be produced in a single batch as opposed to running a separate batch for each type of letter.	Yes	Acknowledgement processes may be run to include all letters or any combination of different letters.
	c. System can accommodate business rules to calculate appropriate acknowledgement letters based on a variety of fields, such as gift amount, designation, donor status, etc. A manual override feature must be available.	Yes	An automated assignment process is built into Blackbaud CRM to automatically assign a letter code to a transaction based upon transaction criteria if desired.
	d. Acknowledgement letters are personalized via mail merge from the database	Yes	Acknowledgement letters can be highly personalized, incorporating any data field from the solution into a merge process.
	e. Record of the acknowledgement letter is recorded in the database, linked to the appropriate transaction and can be linked to a scanned image of the letter	Yes	Blackbaud CRM will track that the letter was sent and associate it to the revenue transaction. A scanned copy of the letter may be added to the individual revenue transaction either as an attachment or utilizing a document management system.
6.	Must have the ability to generate preformatted Voluntary Support of Education report that complies with CASE standards.	Yes	Blackbaud CRM has a configuration tool to identify and group data as needed to then generate the VSE report, directly from within Blackbaud CRM.
7.	Must have the ability to produce FASB compliant reports.	Yes	Blackbaud CRM's financial transaction model was designed to ensure FASB compliance. Reports may be run as necessary. VCU will be responsible for custom reports.
8.	Must have the ability to handle athletics related gifts and benefits such as preferred seating.	Yes	Many customers are tracking athletic gifts and benefits within Blackbaud CRM. Benefits are tracked in various ways depending on requirements; as a Benefit or Split Fund transaction.
9.	Must have the ability to handle gifts and	Yes	Blackbaud CRM supports an unlimited number of

	premiums in one transaction and split the amounts between different funds or allocations.		splits and payment applications in one revenue transaction.
10.	Must have the ability to handle multiple variations of legal and soft credit.	Yes	Blackbaud CRM has a robust recognition credit component to facilitate complex legal and soft credit assignment and reporting.
11.	Must have the ability to manage recurring gifts and pledge payments through automatic billing of credit cards (encrypted) or interfacing with a credit card vendor.	Yes	Blackbaud CRM supports the automated processing of credit cards for recurring transactions and pledge payments.
12.	Must have the ability to enter gifts in batches that correlate to bank deposits.	Yes	Gifts may be batched in any manner desired by VCU.
13.	Must have flexible tender type codes that can be added to and modified for different gift types.	Yes	Blackbaud CRM has the ability to support a wide range of gift types and payment methods.
14.	Must have adequate descriptive blocks for elements such as gift in-kind descriptions. The ability to record appraiser of a gift in-kind and other information.	Yes	Standard functionality exists for the tracking of gift-in-kind transactions, with the necessary fields available to track description, appraiser details, etc.
15.	Must have the ability to record all information on securities and gifts of real property.	Yes	Standard functionality exists for the tracking of securities and real property gifts, with the necessary fields available to track all relevant details of each.
16.	Must have the ability to attach all related documents to the gift, such as donor correspondence, gift agreements and other relevant information.	Yes	Documentation may be stored as attachments on any revenue record. Many customers also utilize a third party document management solution, such as ImageNow, for this purpose.
17.	Must have the ability to monitor open gift batches to determine batch turn-around time. Ability to report on batch workflow and offer features such as placing a batch on hold for issue resolution, or marking with attributes meaningful to the processing team.	Yes	Blackbaud CRM has a batch work flow for each batch. The statuses associated with the workflow all for monitoring exactly where the batch is in the workflow and why. There are standard tools to monitor batch performance and corresponding metrics for evaluation purposes.
18.	Must have the ability to record non-gift transactions, such as event revenue, separate from gifts on the donor record.	Yes	Payments for event registrations, etc. are distinct application type, allowing for easy differentiation for reporting and analysis purposes.
19.	Should have the ability to calculate gift fee based on fee administration rules for each transaction with an audit trail	Yes	Gift fees may be calculated based upon business rules for processing purposes.

20.	Should have the ability to set up discount rates for pledges in order to determine the amount of write-offs.	No	Pledges may be written off, either partially or in-full, but there is no mechanism in place to write off X percentage of the remaining balance. This would need to be calculated manually.
21.	Should have the ability to record and keep track of sponsored research grants and report separately from gifts.	Yes	Grant payments are a distinct application type, allowing for easy differentiation for reporting and analysis purposes.
22.	Should have the ability to track matching grants, e.g. when a donor's gift is matched with an internal fund account.	Yes	The matching grant may be tracked as a donor challenge, with funds tied to the donor challenge during processing to easily facilitate matching grants.

### 8.3.2 Document Management

#	Requirement	Met?	Additional Comments
1.	Must have the ability to link imaged documents directly to the appropriate constituent record.	Yes	Documentation may be stored as attachments on any constituent record. Many customers also utilize a third party document management solution, such as ImageNow, for this purpose.
2.	Should have the ability to upload and link images in batches, e.g., gift documentation, donor stewardship reports, acknowledgement letters, etc., with the appropriate record within a table. Example: An image of the donor check and annual fund response piece is linked to the associated gift record.	Partial	Blackbaud CRM does not have the functionality to natively process attachments in a batch format, however many customers are accomplishing this through the use of a third party document management solution.
3.	Should (strong preference) have the ability to utilize VCU's document imaging system, Image Now. <a href="http://www.perceptivesoftware.com/">http://www.perceptivesoftware.com/</a>	Yes	Many Blackbaud CRM customers have elected to utilize a third party document management solution for storing documents. One Blackbaud CRM customer is currently developing a customization for utilizing ImageNow as an integrated document management solution within Blackbaud CRM. Integration with ImageNow has been included in the pricing assumptions.

### 8.3.3 Non-cash Gifts

#	Requirement	Met?	Additional Comments
1.	Planned Giving. Must have the ability to record	Yes	Blackbaud CRM has standard functionality to track the

	information necessary for the appropriate reporting of common planned giving instruments such as revocable requests, trusts, and charitable gift annuities, such as present value and face value.		necessary details for all commonly-accepted planned gift vehicles.
2.	Must have the ability to record gifts of life insurance, and the associated fields such as cash surrender value, proceeds, premium payments, and termination amount.	Yes	Tracking gifts of life insurance is standard functionality in Blackbaud CRM with the necessary fields available to effectively manage a life insurance gift.
3.	Must have the ability to record pledges	Yes	Pledges are standard functionality within Blackbaud CRM.
	a. Ability to attach scanned donor agreements.	Yes	Scanned donor agreements may be stored as attachments on a pledge record. Many customers also utilize a third party document management solution, such as ImageNow, for this purpose.
	b. Ability to schedule pledge payments at any frequency.	Yes	Blackbaud CRM allows for pledge tracking using standard frequencies or on a donor-directed irregular frequency.
	c. Ability to reduce the amount pledged.	Yes	The pledge amount may be changed with the change recorded on the pledge for auditing purposes.
	d. Ability to split a pledge over multiple funds.	Yes	Pledges may be split across any number of funds with the payment schedule following any split possibility.
	e. Ability to share a pledge with multiple unrelated constituents.	Partial	A pledge may be added to one constituent record with multiple individuals receiving recognition credit for the pledge. However, payments may be applied from any constituent to the pledge so it may be paid down by any number of constituents.
	f. Ability to give campaign credit for a pledge to another constituent.	Yes	Based upon recognition credit reporting, campaign credit could be awarded to another constituent.
	g. Ability for one constituent to make payments on another constituent's pledge.	Yes	Constituents may make payments toward other constituent's pledges.
	h. Ability to monitor past due pledges.	Yes	Past due pledges are easily reported upon for follow-up purposes.
4.	Must have the ability to record all non-cash gifts, such as real estate, art, equipment, licenses, and other forms of gifts-in-kind.	Yes	The ability to track non-cash gifts is standard functionality within Blackbaud CRM.



### 8.3.4 Prospect Management

*Prospect Management is a vital component of a DAR information system. There needs to be adequate functionality to allow the identification of prospects in different categories and states of cultivation, as well as the ability to do complex assignments of prospects to Development Officers, Deans, executive leadership, and volunteers.*

#	Requirement	Met?	Additional Comments
1.	Must have the ability to provide automated ticklers for upcoming tasks and actions. Alerts can be shown at database login, sent via email, or merged into Google Mail or a mobile device based on user preferences.	Yes	When a fundraiser is assigned to a pending step, it appears on their My Fundraiser Page. Additionally, they may be notified of upcoming steps via email, as Outlook appointments, etc.
2.	Should have the ability to provide graphic dashboard of key indicators, such as totals by campaign, appeal, or donor segment at login and based on role.	Yes	Blackbaud's Major Giving Management area provides an aggregate view of fundraising metrics in a variety of different ways. There are also multiple Key Performance indicators (KPIs) for reporting by campaign, appeal, and virtually any other aggregate view that may be required.
3.	Must have the ability to track and report on multiple solicitations for a prospect including such information as:	Yes	Blackbaud CRM allows for multiple simultaneous fundraising solicitations for a prospect.
	a. Solicitation/proposal ask amounts	Yes	Expected ask amount, actual ask amount, and agreed upon amount are standard fields on every solicitation opportunity.
	b. Start/end dates	Yes	May have start and end dates on all solicitations.
	c. Stages with donors	Yes	Donors are tracked by stage and stages are automatically updated based upon the next pending step.
	d. Status	Yes	Status is a standard field.
	e. Campaign	Yes	All solicitations may be associated with a campaign, and even as detailed as a campaign priority or sub priority.
	f. Staff and volunteer assignments	Yes	There may be multiple assignments, categorized by role, on any solicitation.
	g. Segmentation (e.g., major gift, annual fund,	Yes	Prospects are routinely categorized into a giving

	principal gift, etc.)		segment based upon their capacity. These may be easily differentiated on a constituent record.
	h. Solicitation method	Yes	This may be tracked as an attribute on a prospect plan.
	i. Purpose	Yes	First class fields are available for tracking the purpose of a gift.
	j. Approval	Yes	May be tracked as an attribute on the prospect plan.
	k. Outcomes (funded or rejected)	Yes	A status field exists to track the outcome of a solicitation.
	l. Comments, etc.	Yes	Free-form notes, comments, etc. may be added in an unlimited fashion.
	m. Contact types/ purposes	Yes	The contact type may be tracked and categorized as needed.
4.	Proposals must have the following:		
	a. Ability to track portfolios by development officer and by unit.	Yes	Based upon the assigned fundraiser proposals will roll up into a unit count.
	b. Ability to view/track multiple proposals for the prospect from the various departments/units on campus	Yes	A prospect may have an unlimited number of proposals which may cross multiple units and departments.
	c. Ability to link contact report to the proposal.	Yes	Contact reports are natively linked to the proposal when filed.
	d. Ability to link a solicitation/strategy to another prospect's record.	Yes	Participants may be linked to a solicitation on another prospect's record, which allows the solicitation to be viewable from the participant's record.
	e. Ability to track households and reciprocally update contacts so they are automatically applied to a joint-constituent's record and can be overridden if needed.	Yes	When contact information is updated that is shared, there is a prompt to update the shared information or not.
	f. Ability to assign multiple solicitors to a prospect. Ability to maintain a history of solicitor/prospect assignments with start and end dates. Ability to designate a primary manager/solicitor and multiple secondary	Yes	Prospects may carry multiple solicitors in the form of a prospect team. Each solicitor has a designated role. As solicitors change, the history of the manager changes is tracked on the prospect's record.

	solicitors for any prospect, including staff and volunteers.		
	g. Ability to maintain areas of potential funding interest or primary funding interest of a company or foundation.	Yes	Each prospect may have a set of funding interests.
	h. Ability to load a wide variety of wealth indicators that can be used as part of developing an individual's comprehensive wealth and attitudinal profile.	Yes	The Wealth & Ratings area of a constituent record allows for tracking a range of wealth indicators to help determine a prospect's capacity and profile.
	i. Proposal management capabilities such as proposal amounts, and expected future amounts, proposal status and timeline tracking, proposal history and all other aspects of proposals in order to manage the pipeline and cash flow projection.	Yes	Blackbaud CRM has standard functionality to manage and analyze the pipeline to aid in cash flow projection, etc.

### 8.3.5 Prospect Research

#	Requirement	Met?	Additional Comments
1.	Must have the ability to store miscellaneous important attributes about a constituent, including		
	a. Biographic information	Yes	All-encompassing biographic information is stored in first class fields within Blackbaud CRM.
	b. Asset information	Yes	Asset information may be stored in the Wealth and Ratings area of a constituent record.
	c. Personal interests	Yes	An unlimited number of personal interests may be tracked in the Interests area for a constituent.
	d. Post graduate affiliations	Yes	Post-graduate affiliations may be tracked in a variety of ways, including post-graduation education as education records, employment details, affiliations and involvements, etc.
	e. Familial and other relationships	Yes	An unlimited number of relationships may be tracked for a constituent.
2.	Must have the ability to link documents, pictures, items to constituent record	Yes	Documents, pictures, etc. may be stored as attachments, and assigned an appropriate attachment

			type, on a constituent record. Many customers also utilize a third party document management solution, such as ImageNow, for this purpose.
3.	Must have the ability to track various prospect ratings and their source (staff, electronic screening, peer, university or unit defined).	Yes	Prospect ratings are standard functionality in Blackbaud CRM and an unlimited number of user-defined prospect ratings may be created to support organizational needs.
4.	Should have the ability to generate custom entity profiles without having to re-format in another program. The profile report would allow users to select which elements they wanted to see, click on run, and have the report delivered immediately.	Yes	A Prospect Research Report is available where templates may be saved to determine which elements should be included. The report is then run based upon the template selected. The report may also be run-off, not based upon a template, where individual elements may be selected for a one-off report run.
5.	Should be able to generate profiles for individuals or groups of prospects.	Yes	The Prospect Research Report, as well as the Constituent Profile report, allow for generating profiles one-off or en masse.

### 8.3.6 Annual Fund/Communications

#	Requirement	Met?	Additional Comments
1.	Must have the ability to target appeals and analyze results based on flexible combinations of criteria such as:	Yes	A key tenant of Blackbaud CRM is the ability to segment appeals in a flexible way.
	a. Recency and Frequency, e.g., calendar year, fiscal year, first gift date, most recent gift date, years of consecutive giving, year-to-year results comparisons.	Yes	Segmentation may be accomplished using any field in the database. In addition, Blackbaud CRM has a concept called smart fields that dynamically translate raw data into simplified values. For example, rather than needing to specify a range of days to segment by anyone that has given in the past six months, a smart field may be created that automatically calculates the past six months and assigns a 0-6 month tag to the constituent. The moment the constituent is at six months and one day, the smart field would update to reflect the constituent had moved into the next recency group.
	b. Giving Level, e.g., highest previous contribution, current giving club level, most recent gift amount, lifetime giving total.	Yes	Smart fields may be configured for each of these data points applying business rule logic. Then the smart field value may be queried against to provide for segmenting appeals based upon these data elements.

	c. Constituency, e.g., campaign, package, segment, affiliation with school, college or organization, donor status, i.e., current or prior donations to the fund associated with the appeal	Yes	Appeals may be segmented and targeted by leveraging any data element within the database. All of the data elements listed may easily serve as inputs to segmentation.
2.	Appeal/solicitation totals should automatically accumulate as gift batches are posted so totals are available in as close to "real-time" as possible.	Yes	Blackbaud CRM has a data element called finder number that ties a specific mailing piece to a constituent. So, instead of having to enter a constituent ID and an appeal code, only the finder number needs to be entered. Upon entering the finder number, the gift is immediately tied back to the mailing and all associated components to facilitate real-time reporting.
3.	Appeal information should also include information such as number of pieces, cost, date sent and other identifiable attributes.	Yes	Appeals track date sent, cost detail (both variable and fixed), quantity sent, etc. By tracking this detail Blackbaud CRM is automatically able to calculate metrics for the mailing such as response rate, cost per dollar raised, ROI, etc.
4.	Should have the ability to attach images, documents and other elements that made up the actual physical media that was distributed.	Yes	The creative associated with a mailing may be uploaded and attached to the appeal for future reference.
5.	Must have the ability to send mailings to couples that can be joint, separate, same address and/or different addresses with ability to maintain information. Ability to properly customize and merge titles (e.g., Dr. & Dr. or Dr. & Mr.). Ability to have flexible salutation sets (e.g., Presidential salutations, VP salutations)	Yes	Blackbaud CRM supports an unlimited number of name formats on a constituent record. These may be individual or join. When mailings are generated, business rules may be applied to dictate if only one per household should be sent vs. sent individually. Depending upon the type of communication different business rules may be applied to determine which address the mailing should be addressed to. Further, a set of business rules may be also be applied to determine which name formats should be used and for joint mailings, which name should be listed first.
6.	Must have the ability to flag address fields (including street, email or phone) "preferred"	Yes	A constituent may have a preferred/primary address, phone number, and email address.
	a. Ability to maintain multiple preferences related to each address category, e.g. home address(es), business address(es), seasonal home	Partial	This may be addressed by how addresses are categorized and stored. There may only be one true primary address across all address types, but through configuration a primary address for each type may be designated.
	b. Ability to maintain multiple mailing preferences for one constituent to accommodate different campus	Yes	Communication preferences may be assigned based upon the mailing unit and communication types.

	organizations, e.g., one organization mails to the home address, while another has been asked to send mail or call at the business address.		
7.	Should have the ability to select output, ask amounts, designations and other fields based on if-then statements within the query.	Yes	Leveraging smart fields and standard ask ladder business logic built into Blackbaud CRM, this requirement may be achieved to ensure that individualized solicitations may be sent.
8.	Application should have pre-defined segments and impromptu segments.	Yes	Segments may be pre-defined and used in multiple mailings, or one-off segments may be built to support a specific mailing.
9.	Must have the ability to maintain a history of communications activities including dates and types of correspondence sent, e.g., direct mail, broadcast email, personal contact, events, newsletters, donor reports, phoning campaigns, etc. Should have the ability to show in one screen which appeals a constituent has received, e.g., anyone or combination of annual fund-direct mail, telemarketing, major gift proposal, planned giving, etc.	Yes	The complete online and offline communications history for a constituent is maintained on their constituent record.
10.	Donor and prospect preference selections are key to maintaining successful touch point relationships with constituent groups. Application must have opt-out and opt-in capabilities, with date ranges, media types, and be able to be broken down by individual campus units. For example, a donor may wish to receive an invitation for events from one school, university wide magazine in PDF format, and no phone calls for solicitation purposes after 6 p.m. at night.	Yes	Blackbaud CRM also has a mechanism where constituents may indicate their communication preferences across communication types and that may be specified for specific campus entities. This functionality is extended into the online solution for constituents to update their preferences online.

### 8.3.7 Donor Stewardship

#	Requirement	Met?	Additional Comments
1.	Must have the ability to maintain donor reporting requirements	Yes	Donor reporting requirements may be stored directly on the fund record so they may be detailed at the fund level.
2.	Must have the ability to generate reports and lists on schedule requested by donor (monthly,	Yes	The frequency for reporting is stored at the fund level and processed in an automated manner with the

	quarterly, annually, irregular), with manual override.		ability to be manually adjusted as required.
3.	Must have the ability to produce honor rolls based on multiple sets of criteria (e.g., campus wide giving, unit/department giving, campaign giving, etc.).	Yes	Blackbaud CRM supports the concept of recognition programs to facilitate honor roll production. These may be based upon a variety of factors and there may be an unlimited number of recognition programs based upon either annual or lifetime giving.
4.	Must have the ability to maintain information on scholarship and endowment accounts, such that all documentation regarding the account is available, and donors who should be stewarded are linked to the accounts. Examples of use for this data model include the production of donor endowment reports, and tracking of stewardship activities between scholarship donors and the students who receive the scholarship.	Yes	Blackbaud CRM supports complex fund reporting and stewardship details, built specifically with higher education customers in mind. Scholarship funds are linked directly to the recipient constituent. Additionally, all detail required to facilitate effective stewardship reporting is stored directly on the fund record.

### 8.3.8 Gift Planning

#	Requirement	Met?	Additional Comments
1.	Must have the ability to track required information on a variety of planned gifts (bequests, annuities, life estates, pooled income funds, and trusts), including:	Yes	Blackbaud CRM has a robust Planned Gift tracking mechanism to effectively manage planned gifts.
	a. Executor or trustee	Yes	A first class field is available to track an executor/trustee for an estate.
	b. Trust name	Yes	This may be captured in a variety of ways depending upon how VCU wishes to use this data element.
	c. Status	Yes	Status is a standard field available for estate tracking purposes.
	d. Other beneficiaries	Yes	Other beneficiaries may be tracked including primary, secondary, and tertiary.
	e. Market/estimated/actual values	Yes	The fields required to track financial details surrounding planned gifts change depending upon the planned giving vehicle.
	f. Estimated/actual maturity	Yes	The expected maturity is tracked for purposes of

			forecasting where the actual maturity is tracked as a date related to the status.
	g. Comments	Yes	An unlimited number of comments/notes may be stored on a planned gift record.
	h. Revocability	Yes	Whether a gift is revocable is a standard flag on a planned gift.
	i. Valuation dates, each with market value, future value, and source	Yes	Valuation details are stored directly on the planned gift.
	j. Projected payout information	Yes	The projected payout is tracked on the planned gift as well as for annuities, payout frequency and amount.
	k. Professional Contact (without creating a new record and relationship)	Partial	Relationships may be tracked directly on the planned gift record, but a constituent record is required. However, this information could also be tracked as an attribute, where a constituent record would not be required.
2.	Must have the ability to view the planned gifts a constituent has committed to the institution, which may include multiple gifts of varying types.	Yes	All planned gifts may be displayed on the constituent record.
3.	Should have the ability to calculate net present value and other discounted amounts for planned gifts.	No	Blackbaud CRM does not calculate the NPV, however a field is available to store the NPV on the planned gift record but the NPV must come from another source.
4.	Must have the ability to correct for payments that are less than or more than original gift.	Yes	Planned gifts have both an amount field and an original amount to capture the difference in amount when the planned gift must be changed.
5.	Must have the ability to track a contact person for the bequest (e.g. accountant or attorney) without having to create a database record for the contact.	Partial	Relationships for someone like a contact person may be tracked directly on the planned gift record, but a constituent record is required. However, this information could also be tracked as an attribute, where a constituent record would not be required.

### 8.3.9 Campaign Management

#	Requirement	Met?	Additional Comments
1.	Must have the ability to create and manage multiple, overlapping campaign structures with	Yes	Blackbaud CRM supports an unlimited number of simultaneous campaigns.



	a. Fundraising goals and progress toward those goals daily, monthly, annually	Yes	A variety of goals may be established and progress monitored on an ongoing basis, processed on any scheduled desired by VCU.
	b. Starting and ending dates	Yes	All campaigns have start and end dates.
2.	Must have the ability to make multiple assignments to campaigns:		
	a. Multiple departments or units	Yes	Campaigns may be associated with one or more departments or units in a variety of ways depending upon how VCU chooses to track departments or units.
	b. Multiple staff members	Yes	An unlimited number of fundraisers, along with their role for the campaign, may be assigned to a campaign.
	c. Multiple volunteers solicitors	Yes	An unlimited number of volunteer solicitors may be assigned to a campaign.
	d. Multiple prospects to be solicited	Yes	Any major gift solicitation may be associated with a campaign record.
3.	Must have the ability to report on goals and achievements by		
	a. Campaign	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any campaign.
	b. Department or unit	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any department or unit.
	c. Funds	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any fund.
	d. Staff assigned	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any assigned staff fundraiser.
	e. Volunteer solicitors	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any volunteer solicitor.

	f. Prospect pool, household	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be associated with any prospect pool or constituent, including households.
	g. Date range	Yes	Key Performance Indicators (KPIs) evaluating various goals and metrics may be applied to all of the elements contained in this section over any date range.
4.	Must have the ability to comply with Council for Advancement and Support of Education (CASE) management and reporting standards.	Yes	Blackbaud has many higher education customers that use Blackbaud CRM and report to CASE. Data may be pulled in a manner that supports CASE management and reporting standards.
5.	Must provide flexibility in determining what gifts, pledges and planned gifts count toward the campaign and what campaign priority they should count toward.	Yes	The ability to count campaign gifts is incredibly flexible, as well as the ability to attribute gift toward campaign priorities and event sub priorities.
6.	Must have the ability to deactivate and archive campaigns when necessary	Yes	A campaign may be end dated and inactivated so that future gifts are not incorrectly attributed to a prior campaign.
7.	Must have the ability to track hard and soft credit, pledges/payments and matching gifts, and recognition credit across units.	Yes	Blackbaud CRM supports a complex credit model to ensure that soft credit (recognition credit in CRM) is applied to individuals as needed by VCU. This includes credit for pledges and pledge payments, matching gift payments, and appropriate credit for different campus units.
8.	Must have a graphic dashboard tool to track campaign progress.	Yes	Blackbaud CRM has a flexible dashboard tool to display campaign progress in the way that is best needed for VCU.

### 8.3.10 Volunteer Management

#	Requirement	Met?	Additional Comments
1.	Must have the ability to understand and track relationships between volunteers and other constituents, e.g.,	Yes	All volunteers are tracked as constituents in Blackbaud CRM, allowing for use of standard system functionality to track relationships.
	a. Volunteer solicitors and prospective donors	Yes	Volunteer solicitors may be tracked in a variety of ways depending upon how VCU wishes to measure activity and results.

	b. Cub/chapter volunteers and associated constituent group	Yes	Blackbaud CRM has robust committee and group functionality to track leadership roles and volunteers within groups, such as governance structures within an alumni club or chapter.
	c. Volunteer speaker/expert and faculty or organization with whom they have a relationship	Yes	Blackbaud CRM is regularly used to track faculty experts or other constituents with expertise who are eligible to speak at events, etc.
2.	Must have the ability to record volunteer roles, e.g., President of VCU Alumni, Chair of the School of Business Advisory Council, Leader of the VCU DC Alumni Chapter	Yes	Tracking volunteer roles within various groups and committees is standard functionality within Blackbaud CRM.
3.	Must have the ability to track start and end date of volunteer term.	Yes	Volunteer terms are actively tracked both for overall volunteer participation as well as individual roles held while volunteering.
4.	Must have the ability to track volunteer involvement in solicitations and prospect assignments, with the same reporting tools as development officer proposal tracking.	Yes	Volunteer solicitors may be tracked the same as paid staff fundraisers allowing for the use of standard reporting tools and metrics desired by VCU.

### 8.3.11 Event Management

#	Requirement	Met?	Additional Comments
1.	Must have the ability to segment invitees for events and communications based on miscellaneous biographic criteria e.g., interest, past participation, giving levels, region.	Yes	Event invitations may be segmented by any data element present within the database.
2.	Must have the ability to track event history, including date, location, hostess, speakers, invitees, attendees, guests, and follow-up.	Yes	A comprehensive event history is maintained for each event, as well as the event participation history is tracked on each constituent.
3.	Must have the ability to support online registration, confirmation and payment options.	Yes	Event online registration is fully supported within Blackbaud Internet Solutions and event registrations seamlessly passed into Blackbaud CRM for event management purposes.
4.	Must have the ability to manage events where registration includes selection of multiple activities occurring during the event.	Yes	Blackbaud has included fees for a custom event solution that we have developed to help extend the capabilities around multi-level complex events.

5.	Reporting, Letters and other outputs		
	a. Must have the ability to view who will be attending	Yes	A complete list of registrants is available for any event.
	b. Should have a tool to produce satisfaction surveys after an event	Yes	Blackbaud Internet Solutions has a survey tool, which may be leveraged to gauge event participant satisfaction after the event.
	c. Must have the ability to track seating chart, assignments, and special seating accommodations	Yes	Blackbaud CRM has standard seating assignment functionality.
	d. Should be able to generate name tags from attendance listing	Yes	Any data element within Blackbaud CRM may be used for nametag generation purposes and nametags may be easily produced for a list of attendees at an event.
6.	Application functionality that tracks attendees, spouses and guests should include flexible ways to group or categorize participants and track RSVPs	Yes	Attendees may be grouped in any manner that best supports VCU's needs.
7.	Must have the ability to record special requirements (i.e. dietary or other accommodations)	Yes	Registration preferences are standard for any event registration to maintain and track any special requirements.

### 8.3.12 Membership Management

#	Requirement	Met?	Additional Comments
1.	Must have the ability to maintain detailed information about member status, renewal schedules, and premium qualification, such as:	Yes	Blackbaud CRM has sophisticated membership management functionality.
	a. Type of membership, and option for the system to automatically calculate this field based on business rules for dues received (e.g. lifetime member, annual member, members who join at a special rate)	Yes	Blackbaud CRM membership levels may be tracked and categorized according to annual, lifetime, etc. and may have their own unique corresponding dues levels and promotions.
	b. Start and expiration dates of membership	Yes	All memberships that aren't lifetime have a definable membership term.

	c. Multiyear and life memberships.	Yes	Multi-year and life memberships may both be tracked within Blackbaud CRM
	d. Sponsored memberships - who paid for the membership and others included in membership for targeted renewal (e.g. parents paying for child, company paying for employees, dean sponsoring new graduates for first year)	Yes	Membership dues may be applied by other constituents to facilitate the giving of gift or sponsored memberships, etc.
	e. Joint and single memberships	Yes	Memberships may have any number of members on an individual membership – this is set up as a configuration setting when the membership level is established.
	f. Membership splits or transfers (deaths or divorces)	Yes	Blackbaud CRM memberships may be transferred to a different member when circumstances warrant or individual members removed from a joint membership in the event of death, divorce, etc.
	g. Multi-tiered affiliation model with one primary affiliation and multiple additional affiliations (e.g. Alumni primary to VCUA, affiliation with School of Education, Soccer, and Atlanta Area Chapter), and should have the ability to track historical changes to affiliations	Yes	Affiliations may be tracked in a variety of ways within Blackbaud CRM.
2.	Must have the ability to support special alumni programs		
	a. Young Alumni	Yes	Many higher education customers track young alumni designations and programs within Blackbaud CRM.
	b. Distinguished Alumni Awards	Yes	Alumni awards are commonly tracked in Blackbaud CRM.
	c. Homecoming	Yes	Blackbaud higher education customers using Blackbaud CRM routinely manage homecoming events within the solution.
	d. Member Appreciation	Yes	Blackbaud CRM may be used to drive stewardship programs and recognition programs to support member appreciation efforts.
	e. School based alumni events	Yes	Any event may be tracked within Blackbaud CRM and attributed to the school that is managing it.

3.	Must have the ability to track premiums that result from levels of membership, with ability to apply business rules for automatic assignment of the premium items and incorporate this information into fulfillment reporting.	Yes	Blackbaud CRM is able to track premiums and benefits received for specific benefit programs.
4.	Membership renewals		
	a. Must have the ability to determine and generate renewal lists based on business rules	Yes	VCU may specify the standard business rules in configuration that apply to membership renewals.
	b. Must have the ability to produce personalized renewal notices	Yes	All membership renewals may be personalized.
	c. Must have the ability to target and provide special offers or campaigns to groups matching specific criteria, e.g., offer special renewal rate for annual members who renew for three years at once, special offer to first year alumni, etc.	Yes	Special rates may be offered and managed for any membership level.
5.	Membership Dues		
	a. Must have the ability to record membership dues, non-deductible premiums associated with dues, and charitable contributions in the same screen without double entry to record gifts	Yes	Memberships may be processed in one screen to prevent the need from recording memberships separate from payments.
	b. Must have the ability to offer credit card and EFT/ACH payment options and refunds	Yes	Memberships may be paid according to both credit card and EFT/ACH. The ability to refund is based upon provisions established by the payment gateway and not dictated by Blackbaud CRM.
	c. Must have the ability to generate receipts/acknowledgements/letters	Yes	Acknowledgments, receipts and letters may be generated within Blackbaud CRM and recorded on the constituent's record.

## 8.4 Technology

### 8.4.1 Technical Environment

#	Requirement	Met?	Additional Comments
---	-------------	------	---------------------

1.	If vendor proposes a hosted, Web-based, Software as a Service (SaaS) solution:	N/A	Blackbaud CRM is not offered as a SaaS solution.
	a. All hardware and software required for the solution must be housed in a secure site and vendor must provide a SAS 70 style security report from a third-party reviewer	N/A	
	b. Solution must include the services required for installation, integration, testing, and maintenance	N/A	
	c. Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data	N/A	
	d. Solution must provide at minimum daily backups of VCU data with restoration capability to point-in-time or current as required by VCU	N/A	
	e. Solution must run on redundant servers with failover capability	N/A	
	f. Solution must be monitored by the vendor 24X7 with any outages reported to VCU upon discovery	N/A	
	g. Solution must provide Web-based remote and mobile access to all members of VCU community using any industry standard device and browser combination	N/A	
	h. Solution must integrate with existing VCU systems and data without requiring additional middleware or custom coding	N/A	
	i. Solution must provide dashboards and visual displays of information, as well as the capability for VCU to rapidly develop custom and ad-hoc reports, preferably using VCU's Enterprise Business Intelligence Suite reporting tool	N/A	
	j. Solution must provide administrator-level security access suitable to monitor and	N/A	

	manage VCU users, data, workflow, and internal processes		
	k. System outages for maintenance must not be scheduled during normal working hours (Monday – Friday, 8 am – 8 pm, EST)	N/A	
	l. Solution must provide scalability and adaptability to changing business needs. Customization methodology must be specified.	N/A	
	m. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR user access, should describe how users authenticate to the system and how they can retrieve ID/password when they forget them	N/A	
	n. Vendor must detail the Total Cost of Ownership (TCO) over three, five, and ten year periods.	N/A	
2.	If vendor proposes a VCU-hosted solution		
	a. Solution must conform to VCU's architectural standards for operating system, database, server platforms, and user authentication		<p>Blackbaud CRM can be hosted on premise by VCU if required. For this RFP response Blackbaud recommends that VCU utilize Blackbaud's hosting services and opts for Blackbaud to host Blackbaud CRM. (Option #3 a "hybrid" solution). A significant percentage of our Higher Education Blackbaud CRM clients have opted for Blackbaud to host the solution in our hosting environment.</p> <p>If VCU wishes to host the solution on premise then Blackbaud's System Requirements are available <a href="#">here</a>. Blackbaud is happy to discuss with VCU the architectural standards leveraged by VCU and discuss how Blackbaud CRM will fit within the context of those architectural standards. We have completed several of the answers in this section in case VCU is considering hosting Blackbaud CRM on premise.</p>
	b. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR users should describe how users authenticate to the system and how they can retrieve ID/password when they forget them	Yes	Blackbaud CRM is compatible with LDAP and allows a user to utilize their existing Active Directory credentials to log into the system. Forgotten credentials would be retrieved by VCU's standard mechanism for retrieving forgotten credentials.



c. Solution should be capable of running in a virtual server environment	Yes	Blackbaud CRM may be run in a virtual server environment.
d. Solution must provide VCU the capability to install, integrate the CRM with existing systems and data, and manage end-users and data	Yes	Blackbaud CRM leverages a SOAP Web Services API to facilitate the integration of Blackbaud CRM with other systems and data present within the VCU environment.
e. Response time must not exceed 5 seconds on average to load any system form or display on VCU's main network (10 Gb/sec)	Partial	Blackbaud has conducted extensive performance testing results which we can share with VCU. Blackbaud, however, will not commit to response time when a solution is hosted by a customer because we cannot be accountable for any customer networking hardware.
f. Vendor must identify the IT skill-sets required to support the solution	Partial	Blackbaud is recommending that VCU utilize Blackbaud Hosting services and not host BBCRM on premise. If VCU wishes to host on premise then we can share recommended skill-sets of staff required to support the solution.
g. Solution must provide VCU the scalability, adaptability, and customization ability needed to match evolving business needs and processes. Customization capabilities must be robust and flexible.	Yes	Blackbaud CRM is a highly scalable solution built to meet the growing needs of nonprofit organizations. One Blackbaud CRM customer currently has over 50 million constituent records in their database. The Blackbaud Infinity Software Development Kit will allow for robust customization capabilities.
h. Solution must provide Web-based remote and mobile access to all members of VCU community using any industry standard device and browser combination	Yes	Blackbaud CRM is web-deployed and is available on any device utilizing an A-Grade web browser.
i. Solution must be Web-based and provide access via any using any industry standard device and browser combination	Yes	Blackbaud CRM is web-deployed and is available on any device utilizing an A-Grade web browser.
j. Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data	Partial	Blackbaud CRM is deployed on Microsoft Internet Information Server (IIS) 7. Through industry standard best practices all communications can be encrypted using TLS 1.2 which is the successor to SSL.
k. Solution must provide VCU-configurable dashboards and visual displays of VCU CRM information, as well as the capability for VCU to rapidly develop custom and ad-hoc reports.	Yes	Blackbaud CRM dashboards are flexible and may be configured by VCU. Reports within Blackbaud CRM are created and published using SQL Server Reporting Services, allowing VCU to develop any number of custom and ad hoc reports.

	l. Solution must include the services required for installation, integration, testing, and maintenance	Yes	Blackbaud CRM is fully documented to aid in the management of the solution. Much of Blackbaud CRM's technical documentation is currently available on the <a href="#">Blackbaud Developer Network</a> .
	m. Vendor must detail the Total Cost of Ownership over three, five, and ten year periods.	N/A	N/A as we are proposing option #3 "hybrid" solution with Blackbaud hosting the CRM solution.
3.	If vendor proposes a 'hybrid' solution,		
	a. Solution must provide subscription-based licensing	Partial	Blackbaud CRM software pricing is based upon a perpetual licensing model with components of the solution (SDK Toolkit support etc.) utilizing a subscription based model. All our Higher Education Blackbaud CRM customers purchase a perpetual license and a growing number are also opting for Blackbaud to host the solution for them. This "hybrid" approach is what we are recommending for VCU.
	b. Solution must be a single-tenancy architecture where applications, databases, servers and memory, storage and backups are not shared with multiple tenants	Partial	Blackbaud has both dedicated and multi-tenant hosting options and we can provide pricing for both options. Blackbaud CRM is architected to be a single-tenant solution. Even in a multi-tenant environment each customer receives their own application space, their own unique database, there is no co-mingling of customer configurations or data. The majority of our Higher Education clients utilize the multi-tenant hosted environments.
	c. Solution should provide the convenience and cost-efficiency of a SaaS (software as a service)-based CRM application with the robustness and broad customization functionality of an on-premise CRM system.	Yes	Because the solution is web-delivered, the Blackbaud hosted solution provides the exact same user experience as if VCU hosted the solution on-premise.
	d. Solution must include the services required for installation, integration, testing, and maintenance	Yes	Please see the Hosting Services Description located <a href="#">here</a> for additional information on Blackbaud Hosting Services.
	e. User authentication must be LDAP compatible and ideally CAS for VCU administrative access; for DAR users, should describe how prospective students/parents authenticate to the system and how they can retrieve ID/password when they forget them	Yes	Please see Appendix VII for information on Active Directory Integration. For access to the public-facing front-end solution (BBIS), users may use a username and password that they select at registration or that is assigned to them (with the option to change their password). When a password is forgotten, there is a forgotten password link that requires the user to answer security questions before being able to reset their password. It is also possible to integration with a

			third party identity management solution such as CAS, for facilitate access and authentication into BBIS.
f.	Solution must support Secure Socket Layer (SSL), data encryption during transmission, and security protection features that prevent unauthorized access to VCU data	Yes	Blackbaud takes customer data security very seriously. All necessary precautions are exercised to ensure that customer data is not compromised.
g.	Solution must provide minimum daily backups of VCU data with restoration capability to point-in-time or current as required by VCU	Yes	Blackbaud stores nightly, weekly and monthly backups. Weekly and monthly backups are stored offsite for an extended period of time.
h.	Solution must run on redundant servers with failover capability	Yes	Blackbaud hosted applications are run on redundant servers with failover capacity.

#### 8.4.2 Security

#	Requirement	Met?	Additional Comments
1.	Must have the ability to encrypt all communications and transmissions between servers, and between servers and clients.	Yes	Blackbaud CRM is deployed on Microsoft Internet Information Server (IIS) 7. Through industry standard best practices all communications can be encrypted using TLS 1.2 which is the successor to SSL.
2.	Must have the ability to provide both row and field level security.	Partial	Blackbaud CRM's security model is feature and task-based, not field based. In essence, you may add or edit an address, but the security doesn't extend to you may edit address lines but not city or state. In a few instances where field level security is required (e.g. SSN), security is in place. If security is required at the field level for other types of data, Blackbaud CRM may be easily extended using the SDK to control how data is displayed and secured accordingly.
3.	Must have been audited and certified by an independent security consulting firm.	Yes	Blackbaud Hosting Services and Products are certified both PCI-DSS and SSAE16. Additional information on Blackbaud's security compliance may be found <a href="#">here</a> .
4.	Must have the ability to encrypt specific data elements, such date of birth or medical related data.	Yes	Certain fields are encrypted naturally in the solution such as SSN. Additional fields may be encrypted through customization as required. Encryption is at the database level only.
5.	Must have the ability to decrypt encrypted data	Yes	Encryption is at the database level but not at the

	elements restricted to selected users.		viewing level. Extra sensitive fields that require encryption at the viewing level are actually controlled by security – limiting whether or not users are able to view them.
6.	Must be compatible with Virtual Private Network (VPN) technology.	Yes	Blackbaud CRM is a web-delivered solution. If hosted by VCU, the web server may be placed behind the firewall meaning that users that have authenticated through a VPN may only access it. If hosted by Blackbaud, the web delivered solution is available to anyone that has the URL of the landing page and proper credentials to authenticate into the system.
7.	Must have the ability for third party tools (example: Crystal Reports) to access the database and make use of the security rules configured in the application.	Partial	Blackbaud leverages SSRS for reporting. Hosted locally, any third party tool may connect directly to the database and leverage the security tools for purposes of exposing data, etc. If hosted by Blackbaud, access to the database is limited. Blackbaud would work with VCU to further understand this requirement and propose options that allowed VCU to achieve their goals in this area.
8.	Security groups must apply to all parts of the Application, including any built-in reporting and data extraction tools.	Yes	Blackbaud CRM security is a feature-level security model that restricts access to every feature and task in the system, including limiting access to export, query, reporting, etc. Further, the security model restricts the types of reports, exports, and queries that may be run. This may even go as deep as individual reports, queries, and exports if desired.
9.	Software must be certified by a third-party security certification process or audit.	Yes	Blackbaud Hosting Services and Products are certified both PCI-DSS and SSAE16. Additional information on Blackbaud's security compliance may be found <a href="#">here</a> .
10.	Company must have a published policy on the remediation of published vulnerabilities and a policy on re-validating products when updates are released.	Yes	The Blackbaud Application Hosting service undergoes yearly penetration testing from a 3 <sup>rd</sup> party security firm. Blackbaud performs a vulnerability assessment on the hosted environment on a monthly basis.

### 8.4.3 Authentication

#	Requirement	Met?	Additional Comments
1.	Must integrate with Active Directory (LDAP) and Jasig Central Authentication Service (CAS).	Yes	Blackbaud is able to integrate with LDAP servers to facilitate user account provisioning and single sign on. Blackbaud has not integrated with Jasig CAS

			previously. Additional discovery surrounding integration with Jasig CAS is required to determine if Blackbaud CRM may integrate.
2.	Must have the ability to internally maintain the identity of all active users and as necessary be able to link defined security-relevant actions to specific users.	Yes	Each user may be associated with one or more security roles to control their access to the system.
3.	Must be capable of supporting organization password policies, including length, complexity, and lifetime. Application must be able to use the VCU university login (Eid), and have the option to also create "local" users who do not have a university login.	Yes	Users may be associated with active directory account logins and the LDAP server. In doing so, all organization password policies established with Active Directory are enforced and carried to Blackbaud CRM. Additionally, users may be added that aren't in the Active Directory. Further, users of BBIS, the public front end internet solution, may create accounts that are not affiliated with an active directory login in order to update their address, make a gift, register for an event, etc.
4.	Must provide for easy definition and editing of access control rules, and of user/group permissions/accounts by role.	Yes	Blackbaud CRM's role-based security model allows for governing user access at a very granular level. There are over 10,000 permission able features within the system that may be granted to control user access.
5.	Must support remote administration	Partial	If hosted on-premise, VCU staff with security may access the server to remotely administer the solution. If hosted by Blackbaud, no remote access of the server is allowed to ensure and maintain PCI compliance. We would welcome the opportunity to discuss further with VCU to understand exact requirements and business case for this in a hosted environment.
6.	Must have the ability to automatically import user account information from existing directories (ADS Group), and to identify LDAP as the source of the information at the time of import into the application.	Yes	User accounts may be automatically created directly from the LDAP directory. The linkage to LDAP is maintained so the source of the account is clear.
7.	Must have the ability to interoperate with security domains and databases on other systems. (ADS/LDAP)	Yes	Leveraging the Web Services API, the solution is able to integrate with other solutions, regardless of domain, etc.
8.	Must have the ability to log the activity and use of its data manipulation tools.	Yes	All activity is logged in audit tables. This includes any inserts, updates, and deletes.
9.	Must have role-based security.	Yes	Role-based security is standard in Blackbaud CRM.

## 8.4.4 Application Administration

#	Requirement	Met?	Additional Comments
1.	Must have the ability to support multiple client operating systems: Microsoft Windows 7 and higher, and Apple Macintosh 10.2 and higher.	Yes	Being web delivered, Blackbaud CRM is browser-dependent but not operating system dependent.
2.	Must be implemented as a web application.	Yes	Blackbaud CRM is delivered via the web and is written in HTML5.
3.	Must not require browser plug-in, desktop client software, or administrative rights to run. Provide a comprehensive list of web browsers and mobile browsers supported by the application, as well as support plans for future browser updates.	Yes	<p>No plug-ins are required to run Blackbaud CRM. The following browsers are supported:</p> <ul style="list-style-type: none"> <li>- Internet Explorer 8.0 and higher</li> <li>- Firefox</li> <li>- Safari</li> <li>- Chrome</li> <li>- Mobile Safari</li> <li>- Mobile Android</li> </ul> <p>When a new browser is released Blackbaud tests it to ensure browser compatibility. However, because the application is written in HTML5 using industry standards, application conflicts due to browser updates are minimal.</p>
4.	Must have a web interface or GUI for all aspects of application administration, including user account management, software updates, and application configuration.	Yes	The majority of application administration is done within the application itself via the web browser interface. Software upgrades leverage an installer package that must be run on the server. The SDK is a standalone application that must be run to build software customizations.
5.	Must have the ability to allow administrative operations to be executed in batch form (example: modify the attributes of a set of users).	Yes	Many administrative tasks may be performed in bulk.
6.	Must be able to create and add custom tables to the system, and deploy information on fields from these tables onto system screens.	Yes	Custom tables may be added to the solution using the SDK. When a custom table is created, part of the process is adding the fields where necessary in the system, adding those fields to query, and applying security to the new data elements.
7.	Must be able to create custom validation rules for the system without requiring custom programming.	Yes	Validation logic is naturally built into the system. Examples include name formatting, field integrity, etc.
8.	Custom validation rules or tables created in the	Yes	Blackbaud treats all customizations and new tables as

	system must not jeopardize the successful installation of regular updates or patches from the vendor.		extensions to existing functionality, ensuring that conflicts will not arise during upgrades.
9.	Must have the ability to lock out users in some or all security groups in order to perform system maintenance.	Yes	User accounts may be locked out if required.
10.	Application email component must integrate with VCU email. VCU uses Google Apps for Education.	Partial	If Google is access via Outlook, Blackbaud has an Outlook plugin to integrate with Blackbaud CRM. Blackbaud is also currently exploring integration and testing with Google Apps but it is not fully developed for customer release yet.
11.	Quick data entry screens should be available and it should be easy for internal staff to develop these screens with back-end validations.	Yes	All data is entered or edited via forms (except in batch). VCU may build any number of add or edit forms with appropriate field placement using the SDK. Additionally, one form may be repurposed in a number of ways. Default values are contained in a task that calls a form. Any number of tasks may be created to call the same form, each with a different set of default values for purposes of simplifying data entry.
12.	Should have the ability for application jobs (examples: reports, extracts, data loads) to be scheduled for unattended operation.	Yes	All business processes may be assigned a job schedule to run unattended. These can also be setup in a queue fashion if desired.
13.	Should be able to configure the screens within the system such as renaming of the fields, allowing only certain blocks of data to be seen, screen colors, logos and everything else that is required to "brand" the user experience in the system to the University.	Yes	In order to keep consistency throughout the system, Blackbaud CRM does not allow for the renaming of fields at the database level however the caption for the field on the front end of the solution may be changed. By leveraging a combination of the comprehensive role based security in Blackbaud CRM and advanced configuration, specific views of the data can be delivered to meet the University's needs. The overall look and feel of Blackbaud CRM is managed through Cascading Style Sheets (CSS) and JavaScript. While most customers choose to leave the default branding intact the system implementation team can work with the University staff during the project to determine how best to meet the University's needs in a cost effective way.
14.	Should be able to turn on and off full audit capabilities on all tables in the system, which should store a complete before and after picture of a record.	Yes	Blackbaud CRM leverages SQL Server auditing at the table level. VCU may enable/disable auditing on each system table.

## 8.4.5 Customization and Configuration

#	Requirement	Met?	Additional Comments
1.	Must have the ability to be configured and customized for DAR's specific needs.	Yes	<p>Blackbaud provides tools for both configuration and customization. Many business rules are configured using wizards within the system. Examples include duplicate logic, relationship settings, address formatting business rules, etc.</p> <p>Blackbaud CRM also has a front-end toolset, called Page Designer, which allows for configuring the look and feel of the system. With this tool, users - with appropriate security rights and proper training - may create new pages, add tabs, create new data lists, etc. These types of configurations do not require advanced technical knowledge as no coding is required.</p> <p>Lastly, Blackbaud CRM is delivered with the Blackbaud Infinity Software Development Kit, allowing users with advanced technical knowledge to build customizations and integrations. Coding is required for SDK usage.</p>
2.	Should have the ability to add a new data element to the application/database.	Yes	Many data elements may be captured as attributes, however if a first class field is required it may be added using the SDK.
3.	Should have the ability to tie the new element to an existing dataset.	Yes	Blackbaud's development philosophy is to create new data objects and relate them back to existing data elements. This ensures that the object is extended to capture the data required; however the core database tables are not modified to ensure that integrity is preserved during upgrades.
4.	New data elements should be editable and viewable by end-users on an application form.	Yes	When a new data element is added it may be placed where VCU requires.
5.	Should have the ability to define and limit the allowable data values for the new data element.	Yes	If the data element is a code table, the values may be restricted. Additionally, the field type will be defined when added so if it is a date field for example, only a date will be allowed.
6.	Should have the ability for application data manipulation and conversion tools to populate the new data element.	Yes	A custom global change could be written to facilitate this. Otherwise in many instances that may be achieved through an export/import process.
7.	Should have the ability to secure this new data	Yes	When new data objects are added they are added into



	element throughout your application.		the security model to apply security as needed.
8.	Should have the ability to customize the business logic within the application.	Yes	Business logic is configurable to meet VCU's business needs.
9.	Should have the ability to maintain these customizations through application patches and upgrades.	Yes	Customizations written using the Blackbaud SDK are preserved during upgrades and supported accordingly.
10.	Should have the ability to migrate between instances (example: from test to production).	Yes	Customizations are written as packages that may be deployed in any environment. Blackbaud has also built a Configuration Manager toolset to facilitate the migration of front-end configurations between environments.

#### 8.4.6 Software Maintenance and Support

#	Requirement	Met?	Additional Comments
1.	Must have annual and multi-year software support available.	Partial	Blackbaud typically offers annual customer support subscriptions that is renewed each year. For additional information, please refer to the Scope of Support included in Appendix VIII: Blackbaud CRM - Support and Maintenance.
2.	Must provide software support for all software, including any bundled technology.	Yes	<p>The Advantage Partner Scope of Support includes:</p> <ul style="list-style-type: none"> <li>- Providing a new features guide for description of new functionality in each Major Release or Point Release</li> <li>- Diagnosing problems, issues or Errors not resolved by your Help Desk</li> <li>- Performing reasonable efforts to resolve reported and verifiable Errors in supported programs</li> <li>- Answering questions about and troubleshooting the installation or upgrades of your software</li> <li>- Offering direction on troubleshooting performance issues</li> <li>- Assisting with the use of Blackbaud-created troubleshooting tools</li> <li>- Offering direction setting up users and system roles</li> <li>- Offering guidance in troubleshooting users and system roles</li> <li>- Offering direction regarding setting up Key Performance Indicators ("KPI"), Smart Fields, and Selections</li> <li>- Assistance with customization repairs, developed via the SDK, that are affected by a software upgrade</li> </ul>

			For more information, please refer to Appendix VIII: Blackbaud CRM - Support and Maintenance.
3.	Software support must include:		
	a. Error Corrections	Yes	Please see Appendix VIII: Blackbaud CRM - Support and Maintenance for Blackbaud's complete response to this requirement.
	b. All Updates made available to licensees of the Software	Yes	Please see Appendix VIII: Blackbaud CRM - Support and Maintenance for Blackbaud's complete response to this requirement.
	c. Any Upgrades made available to licensees of the Software without an additional license fee	Yes	For those with active and current support maintenance, all releases, patches and applicable modifications covered in Appendix VIII: Blackbaud CRM - Support and Maintenance are made available via download.
	d. Technical assistance on the installation, use, performance tuning, maintenance, and repair of the Software.	Yes	Please see Appendix VIII: Blackbaud CRM - Support and Maintenance for Blackbaud's complete response to this requirement. In a Blackbaud hosted environment our hosting services takes on the bulk of this work (installation, performance tuning, maintenance etc.)
4.	After each major new release of the application, software support must be provided for the prior version of the application for a minimum of one year.	Yes	Blackbaud's standard is to provide at least one year's notice before ending support of a current product version.
5.	Software support must be available for the Operating Platform (or its future versions) and database (or its future versions) initially selected by VCU for a period of five (5) years from the initial date of Production Use, provided that VCU continues to operate the Software on that Operating Platform.	Yes	Blackbaud can commit to 5 years based on the Effective Date of the contract, provided that the University is current on product upgrades and best practices. Software fixes are generally provided for critical issues up to 2 point releases prior to current version or latest version (e.g. 2.7 versus 2.9). All new functionality and non-critical fixes are provided in the latest version.
6.	Must provide prompt response to contacts from DAR's authorized personnel.	Yes	Blackbaud service targets are to answer all incoming calls within four (4) minutes and provide initial responses to email requests within twenty (20) minutes but in no event later than sixty (60) minutes of original request made during Normal Support Hours and After Hours Support.
7.	Must provide prompt referral of usage questions,	Yes	Blackbaud CRM specialists attend an intensive six-

	reported Errors, and other inquiries to Vendor personnel who have a level of experience and skill sufficient to provide prompt and accurate responses.		<p>week training program, designed to teach them CRM functionality, SQL Server training, advanced configuration, and integration with other Blackbaud products. In addition to software and technical trainings, additional classes on customer service skills and industry knowledge are provided. Important to note is that the majority of employees on the Blackbaud CRM team have already been with Blackbaud for several years before transferring to this group, so these trainings supplement an already healthy understanding of non-profits and fundraising. Finally, ongoing education continues throughout their tenure on the Blackbaud CRM team, particularly on software functionality and technical skills.</p> <p>As a Blackbaud CRM customer VCU would have a Technical Account Manager (TAM) that acts as the main point of contact for VCU and helps manage cases that VCU has open with Blackbaud hosting and support. The TAM provides weekly status checks on cases and acts as an escalation point should progress and responses not be in line with VCU's expectations.</p>
8.	Must provide prompt and diligent efforts to provide information or Error Corrections in response to DAR reports and inquiries, according to the severity of the problem.	Yes	<p>When you contact Support for assistance, we create a case to document your question or issue, the resolution, and any related contacts (e.g., emails or phone calls) that take place during the life of your case. Every case has a title and a unique case number so you can easily locate it in Case Central. To distinguish critical issues from questions, we use the following severity levels:</p> <ul style="list-style-type: none"> <li>- <b>Down:</b> You cannot use the software on any computer.</li> <li>- <b>Critical:</b> The software is operational, but a critical feature is failing. For example, several computers aren't functioning, or you can't run payroll or report cards.</li> <li>- <b>Problem:</b> The software is operational, but you have time-sensitive questions or are receiving an error.</li> </ul> <p>When you contact Support, please indicate if your issue is critical or down so we can give your case the highest priority. To ensure you receive a resolution as quickly as possible, we have a Critical Situation (Crit-Sit) procedure through which our managers are automatically notified when their analysts are working on down or critical cases. They'll work with analysts to promptly and efficiently resolve your issue, and they'll proactively follow up with you so you'll know who to contact if you need additional assistance. The Crit-Sit process continues to notify higher level of management at various intervals until reaching the Director and/or VP level. Support will provide recurring updates with progress on resolution and, for critical</p>

			issues, daily updates (or even hourly if needed) are common.
9.	The application and Software Development Kit should be compatible with new versions of development software (Visual Studio, .NET) within one year of their release.	Yes	Blackbaud Support stays current on all supported development tools, such as when a new release of vb.net is released, as long as it is consistent with the Software Developer Kit (SDK) subscription scope of support.
10.	Service days should be Monday through Friday, and service hours should be 8-5 EST at a minimum (prefer 24/7 support), with online and telephone availability.	Yes	For customers based in the United States, domestic-based telephone support is provided. Our online resources are available 24/7, and you can call Support between 8:30 a.m. and 8:00 p.m. ET, Monday through Thursday and between 9:00 a.m. and 8:00 p.m. ET on Fridays, excluding holidays. Domestic-based services for the standard hours are provided as part of your maintenance plan. We also offer online chat support for most products.

## 8.5 Reporting and Self Service Functions

### 8.5.1 Online Services

#	Requirement	Met?	Additional Comments
1.	Must provide secure environment for credit card processing that is PCI and NACHA compliant, or the ability to interface with a secure credit card processing vendor	Yes	Blackbaud solutions are fully PCI-compliant.
2.	Should provide an online giving portal through which constituents can		
	a. Make a secure credit card gift	Yes	Credit card gifts are standard and will be processed in a PCI-compliant manner.
	b. Choose from a menu of giving options (multiple funds)	Yes	Constituents may give to a variety of funds in one single transaction if they so desire. Funds may be displayed in a variety of ways depending upon the user experience that VCU wishes to provide its constituents.
	c. Complete the transaction through secure web forms	Yes	All transactions are processed in a secure manner using web forms.

	d. Receive an emailed acknowledgment of their gift	Yes	An acknowledgement is sent via email following a gift. Acknowledgements may be general in nature and the same acknowledgement sent for all online donations, or different acknowledgements may be sent for different donation pages, etc.
	e. Make a pledge, and schedule recurring pledge payments	Yes	Pledges may be made with the payment frequency determined by the donor based upon the options that VCU wishes to make available to donors online.
3.	Credit card processing should integrate with automated batch processing of online gifts	Yes	All credit cards are processed before the gift is brought into the database. All online transactions are brought into Blackbaud CRM and processed via gift batch.
4.	Should have the ability to support an online community in which users are able to find and contact one another, as well as support multiple permission levels in the alumni online community (e.g. public, registered user, paid member, lifetime member).	Yes	Directory functionality is a standard part of Blackbaud Internet Solutions. Permissions may be assigned in varying levels according to the user role. The role may be automatically determined based upon data elements associated with the constituent and do not need to be manually assigned.
5.	Should have the ability to provide online, self-service profile module to	Yes	Constituent self-service is an important element of Blackbaud Internet Solutions.
	a. Allow alumni and donors to submit address changes	Yes	Addresses may be updated online and brought into an update batch for review and processing. Changes may also be auto-applied if VCU so desires.
	b. Allow alumni and donors to provide information about employment, relationships, e.g., marriages, etc.	Yes	Constituents may add employment and spouse information through a profile update in a straightforward manner.
	c. Allow alumni to check their records and membership status	Yes	Alumni are able to review their alumni record and membership status simply by logging in to the online solution. VCU has a choice of where they wish to display this information (landing page, dedicated page, etc.)
	d. Allow alumni to update their membership affiliations and subscription preferences	Yes	Memberships may be updated online. Blackbaud CRM also has a mechanism where constituents may indicate their communication preferences. This functionality is extended into the online solution for constituents to update their preferences online.
	e. Allow alumni to view donation and membership history	Yes	The donation and membership history may be displayed online. It is up to VCU to determine how this information is surfaced (e.g. all gifts, only certain types

			of gifts, gifts to specific funds, etc.)
	f. Allow alumni to submit class notes, etc.	Yes	Alumni are able to submit class notes online. VCU may also display class notes online for other alumni to view.
	g. Ability to integrate the self service functions into the alumni online community	Yes	All of the self-service functions are prominently featured within the online community.
	h. Manage subscription and communication options	Yes	Blackbaud CRM also has a mechanism where constituents may indicate their communication preferences. This functionality is extended into the online solution for constituents to update their preferences online.
	i. Utilize the system to mass email using segments and targeting specific groups without requiring additional programming.	Yes	The marketing function within Blackbaud CRM that allows for complex segmentation is fully multi-channel. Messages may be sent via email to segments.
6.	Should support online event registration with secure credit card payments.	Yes	Event registration is standard functionality within Blackbaud CRM and BBIS.
	a. Ability to create multiple fee types and tabulate ticket prices.	Yes	Events may have an unlimited number of fee types.
	b. Ability to combine event payment with a gift	Yes	Event payments and gifts may be processed in one transaction.
	c. Ability to store benefit information (t-shirt, etc.)	Yes	Benefits are tracked by registration type and attributed to the event registration payment when processed to facilitate proper receipting and quid pro quo requirements.
	d. Ability to link to main database for registrant preference attributes (dietary restrictions, etc.)	Yes	Blackbaud CRM and BBIS are fully integrated so that the data points captured in Blackbaud CRM are available within BBIS. Registrant preference attributes are standard functionality.
	e. Ability to store RSVP information	Yes	RSVPs are tracked the same as event registrations – they are essentially a \$0 event.
	f. Ability to have event rules that would trigger actions, such as alert when prospect registers for an event	Yes	Any user may be notified when a constituent registers depending upon the business rules established (e.g. notify a development officer when any of their prospects register for an event).

7.	Should provide the ability to send staff alerts based on business rules that will notify them of online activity such as making a gift, registering for an event, updating personal information	Yes	Any user may be notified when a constituent takes a specific action according to VCU's business rules.
8.	Should include a Content Management Service. One of the keys to online services is the ability of the system to include a robust integrated content management system that allows elements used in the system to be easily deployed on web pages such as an events listing, display of an events calendar and other elements included in alumni community software.	Yes	BBIS offers a content management solution. Some organizations use the BBIS CMS to manage their entire website while others use the BBIS CMS solely to surface pages that are integrated with the database.
9.	Should have the ability for information updated online to be subject to review and editing by records management staff prior to posting into the database.	Yes	All online transactions are batched for staff review and approval before being recorded to the database.
10.	Should support social media functions such as blogs.	Yes	BBIS does have built-in functionality to support blogs; however many customers leverage WordPress and then surface the blog within BBIS using a content part and a feed from WordPress because the toolset is more robust.
11.	Must support the use of automation devices such as bar code readers.	Yes	Bar code readers are available for ease of processing data, etc.
12.	Should allow users to create macros for repeated data entry function.	No	Macros are not available however defaults may be established to aid in repeated data entry function as well as fields are smart so they require minimal keystrokes and autofill.

## 8.5.2 Reporting and Authoring Tools

#	Requirement	Met?	Additional Comments
1.	All application data elements must be available to the reporting tool.	Yes	Blackbaud CRM leverages SQL Server Reporting Services (SSRS) for reporting. This enables reporting off any data element in the solution, including reporting off of data elements contained in the data warehouse.
2.	Must provide the ability for reporting tools to be integrated with the application	Yes	SSRS reports are fully integrated within Blackbaud CRM and may be surfaced anywhere applicable within the solution.

3.	Must have availability of online help functionality.	Yes	Blackbaud has context-sensitive help available from anywhere in the solution. Help files may be edited by VCU if desired.
4.	Must have the ability for end-users to construct and execute a query.	Yes	There are two query tools within Blackbaud CRM – ad hoc query and smart query. Ad hoc query allows for individually selecting filters and output fields from any field in the database. Smart query provides for a template-based query where users simply need to populate the values for their desired filters.
5.	Must have the ability for a user to group records within a report and sort the resulting groups.	Yes	Sorting and grouping tools are available within SSRS reports. Sorting and grouping options must be developed within the report definition in order to be available within the report (e.g. how to group, which columns to allow sorting on, etc.).
6.	Must have ability to download lists/reports into common applications such as Word, Excel, etc.	Yes	Query results, data lists, and report outputs may be downloaded into standard third party solutions.
7.	Must have the ability to save queries for later usage and/or further validation by reporting staff	Yes	All queries may be saved and made available to all users, with the option to restrict if users may run a query or if users may edit a query.
8.	Should have the ability to hide the details within the groups and drill down from a group summary report into a detail report.	Yes	This is a function of SSRS reports and is an option if defined within the report definition.
9.	Should include pre-built reporting views.	Yes	Blackbaud CRM comes with 100+ standard reports out of the box.
10.	Should have the ability to integrate dashboards and other graphical indicators directly into the screens without the need for custom programming.	Yes	Blackbaud CRM allows for graphical dashboard stat may be configured and defined in a variety of ways to provide simplified data analysis.
11.	Should allow end-users to perform segmentation and solicitation queries without the assistance of a programmer.	Yes	All Blackbaud CRM query tools are front end and may be made available to any user.
12.	Should have the ability for end-users to query any data element in the Application through the query tool.	Yes	All fields are available within query.
13.	Data elements should be described and documented for end-users through the query tool.	Yes	All fields in query use friendly language to define what they are; no knowledge of back-end field names is required.



## 8.6 General

## 8.6.1 Vendor Implementation Support

#	Requirement	Met?	Additional Comments
1.	Vendor must be able to provide assistance in determining which DAR business processes should be modified to conform to the software best practices and which should be supported through customizations or interface development.	Yes	Blackbaud has extensive industry knowledge in higher education and can provide recommendations and best practice approach to the implementation. Under the pricing assumptions, Blackbaud has outlined 2 different methods for implementation. Blackbaud will work with VCU to determine which approach fits their needs best.
2.	Vendor must be able to provide assistance to our technical team in developing business rules and applying them to the software.	Yes	Blackbaud assumes technical work described in this RFP will be design, implemented, built and deployed through the assistance and collaboration with Blackbaud technical resources. VCU staff will get extensive technical training and it is assumed will partner with Blackbaud to gain system knowledge to implement business rules, configurations, customizations and interfaces.
3.	Vendor must be able to provide assistance with testing the hardware and software prior to delivery and during installation.	Yes	Blackbaud will support VCU during the testing phase of the project. Testing includes data migration, business process, integration, and customization testing. Blackbaud can provide technical support through professional services or customer support to perform hardware testing. Working with our hosting team we will work with VCU to test both the implementation and production environments to ensure that they are operating satisfactorily for VCU.
4.	Vendor must be able to provide assistance converting legacy data to the new system, including the mapping of table data.	Yes	Blackbaud has converted other customers from Millennium to Blackbaud CRM. Blackbaud has included effort for data analyst to convert the data to Blackbaud CRM will mapping and testing support from VCU. As a starting point, Blackbaud will leverage knowledge from other Millennium customers as a baseline to start the conversion mapping activities.
5.	Vendor must be able to provide assistance with data cleansing required prior to conversion.	Yes	Data cleansing can take four forms during a project of this scale:  1. Blackbaud informs VCU of known areas of incorrect or bad data and VCU cleans up the data (i.e. Event names that may not be unique).

			<p>2. Blackbaud utilizes the conversion utility or other service engines to clean up the data during the migration process. This could include duplicates, removal of incorrect data, and modification of data in order for it to convert properly.</p> <p>3. VCU uses Blackbaud's conversion utility to inform that data fields that need to be modified (i.e. all address types of Street to be converted as St.).</p> <p>4. Items of non-priority may be classified as post conversion clean up. VCU is responsible for cleaning up the data after the system is live.</p>
6.	Vendor must be able to provide guidance regarding the conversion of existing interfaces to work with the new system.	Yes	Blackbaud will determine with VCU which data needs to be converted through the data migration process in addition to Millennium or if the interface will populate the data after or during the live process. For example, scholarship recipients may be populated from the Import process build to support the integration.
7.	Vendor must be able to provide training during and after the implementation.	Yes	Blackbaud has included a list of training included in the pricing assumption section. Training includes functional, technical, and interactive learning methods. This implementation will also include editable and customizable courseware.
8.	Vendor should be able to provide online training resources.	Yes	Blackbaud has included Learn CRM which provides VCU access to its library of self-paced electronic learning. This library can be accessed by end users, 24/7. There are more than 60+ lessons available.
9.	Vendor should assist VCU with the migration/conversion of data in Millennium to the new system.	Yes	Blackbaud has converted other customers from Millennium to Blackbaud CRM. Blackbaud has included effort for data analyst to convert the data to Blackbaud CRM will mapping and testing support from VCU. As a starting point, Blackbaud will leverage knowledge from other Millennium customers as a baseline to start the conversion mapping activities.

### 8.6.2 Vendor Requirements

#	Requirement	Met?	Additional Comments
1.	Vendor must be able to ensure confidentiality of VCU and affiliated foundation owned data.	Yes	Blackbaud will work with the VCU team to ensure all measures are taken to maintain the confidentiality of VCU and affiliated owned data.

2.	Vendor should have implementation staff located in the Richmond, VA region.	Partial	Implementation staff may not reside in Richmond, VA as their primary residency, however, the implementation team will be onsite or remote to conduct this implementation. Blackbaud can provide VCU information on which activities will be conducted onsite or remote. We assign resources to projects based upon skillset, geography and availability. We will work with the VCU team to make sure we staff up the project with the most appropriate resources based upon VCU's requirements.
3.	Vendor should be able to provide onsite vendor support throughout project including but not limited to project management, technical and training.	Yes	The consulting services estimate does include project management, configuration, consulting, technical and training resources that will collaborate with VCU to implement a comprehensive CRM solution.

### 8.6.3 General System Requirements

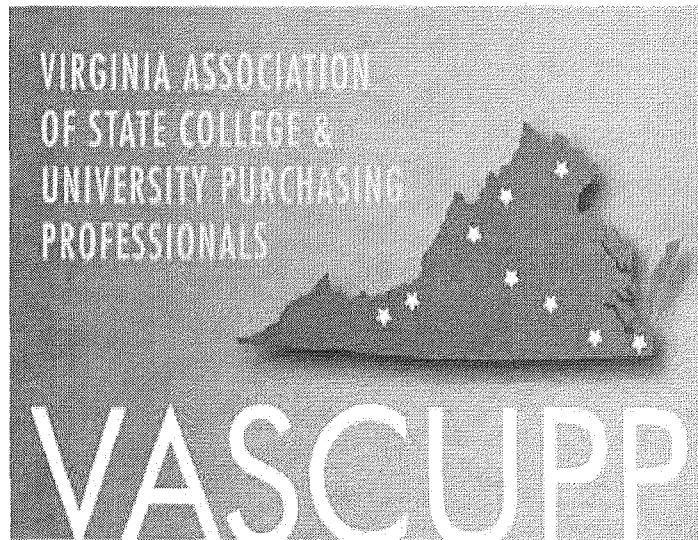
#	Requirement	Met?	Additional Comments
1.	Must have a demonstrated ability to support 1,000,000 or more active constituent records while providing acceptable response time in all areas of the application. VCU database currently holds 300,000 active constituent records.	Yes	Blackbaud CRM is a scalable solution that has the ability to meet the needs of growing organizations. One Blackbaud CRM customer currently has over 50 million constituent records in their Blackbaud CRM database with many more exceeding the 1 million constituent thresholds.
2.	Software should be installed and in use at similar organizations (public research university with academic medical center) with comparable DAR and IT staffing, and who may be either working on, or have completed, campaigns in excess of \$1 billion.	Yes	Blackbaud CRM has been selected and is in use at several institutions similar to the profile of VCU – large, complex, public research institution, with an academic medical center that is looking to embark on or in the midst of a significant fundraising initiative. By reviewing our Blackbaud CRM client list and talking with the references that we provided in this RFP we believe VCU will be confident that the solution we are proposing has been a good fit for these similar institutions and will be a great fit for VCU.
3.	The system should support workflow management and automation. For example, when a prospect is cleared, when a gift is processed, there should be configurable notifications that can be automatically sent to update a gift officer or other staff as to the activity that has taken place.	Yes	Blackbaud CRM has a variety of mechanisms in place to notify users of actions that have taken place. Examples include email alerts; RSS feed push notifications, and on-screen lists of qualifying records (e.g. new gifts, clearance approved, etc.)
4.	System lookups should allow the use of wildcard	Yes	Blackbaud CRM leverages industry standard wildcard

	characters.		characters for searches.
5.	Vendor should provide a strong user community, with annual conferences and regular training opportunities.	Yes	Blackbaud's annual user conference, BBCON, is the largest nonprofit technology conference in the world. Additionally there are other opportunities throughout the year to facilitate customer interaction including an Executive Higher Education Forum and Technical Developer Network Higher Education conference.
6.	Vendor should have a product roadmap and be able to share plans and vision for future product development and enhancements.	Yes	Blackbaud routinely updates our roadmap and provides features previews on a regular basis showing what is in development for future release.
7.	System should have configurable messages that display when a user logs in, so that relevant system administration messages can be deployed to all users, or groups of users to convey key information.	Partial	Customers have successfully satisfied a similar requirement leveraging the Blackbaud Infinity SDK. However, this may not be achieved out of the box.
8.	Wherever possible, the system should have hyperlinks to navigate between relevant pieces of information. For example, if you click on the spouse name in a record you should be taken to the equivalent spouse screen.	Yes	Ease of navigation is a fundamental component of Blackbaud CRM. Being a web delivered solution, navigation is guided by hyperlinks to make it easy to navigate the solution.



# VASCUPP Member Pricing Only:

- The following document outlines the pricing concessions for Blackbaud Constituent Relationship Management (CRM) software and services that Blackbaud will extend to VASCUPP member institutions. Pricing concessions will be valid through June 30<sup>th</sup>, 2017 with a signed set of purchasing documents for software and services purchased for Blackbaud CRM implementations.
- Each VASCUPP member will work with Blackbaud on an agreed upon Scope of Work and Agreement to Purchase.



College of William and Mary  
George Mason University  
James Madison University  
Old Dominion University  
Radford University  
The University of Virginia  
Virginia Commonwealth University  
Virginia Military Institute  
Virginia Tech

# VASCUPP Pricing Concession through June 30<sup>th</sup>, 2017:

Item Description	VASCUPP Members
Software Blackbaud CRM Only	10% discount off list price of software
Maintenance Blackbaud CRM only	Calculated as 22% of list price of software
Technical Account Manager for Blackbaud CRM	Included in 22% Maintenance pricing listed above
Maintenance Blackbaud CRM only	Year 1 invoices for Maintenance will be issued upon Blackbaud making the Software available for download.
Maintenance - Blackbaud CRM only	Years 2 - 6 Maintenance renewal fee increase would be capped at 5%. Thereafter maintenance fee increases will be commensurate with Blackbaud's annual increase across its customer base for similarly situated customers
Hosting – pre and post production environments	10% discount of list price
Hosting fees	Fees to remain the same for 36 month contract agreement
SDK Toolkit Subscription	10% discount off initial term set forth in Order Form.
Subscription Renewals	Subscription fees shall be fixed during the initial term set forth on the Order Form. Following the initial term Subscription fee increases shall be commensurate with Blackbaud's annual increase across its customer base for similarly situated customers

# VASCUPP Member Rate Concession Valid through June 30<sup>th</sup>, 2017.

Blackbaud Services Resource	Bill Rate	VASCUPP Members Rate
Engagement Manager	\$250	\$210
Project Advisor	\$250	\$210
Fundraising Consultant	\$250	\$200
Configuration Consultant	\$225	\$195
System Architect	\$250	\$200
Conversion Analyst	\$200	\$195
Tech Consultants	\$250	\$200
Interactive Consultants	\$225	\$200
Business Intelligence Consultant	\$225	\$190
Training Consultants	\$200	\$185
Region Code Customization	\$5,400	\$4,860
Multi-Level Events Customization	\$20,000	\$14,000
Editable Courseware- Jumpstart	\$17,500	\$15,750
Grateful Patient Customization	\$15,000	\$13,500

- VASCUPP Services rates would remain the same for the duration of the initial implementation project. Thereafter rate increases will be commensurate with increases across Blackbaud's customer base for similarly situated customers.