



May 10, 2019
Page 1 of 3

FROM: Dan Martens

DR

Director of Procurement
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SUBJECT: 20-3-10001-02010
Alumni Relations CRM Software Engagement / Due 5-16-19/2PM/Local Time

Addendum #1

This addendum forms a part of and modifies bidding requirements that pertains to the above mentioned project.

All bidders shall acknowledge receipt of this addendum on the bid proposal form.

DM/bw

Procurement

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Questions & Answers

1. How many people would you anticipate registering for those events?
Our events vary in size from 35 to 400 guests.
2. Section II System Specifications, Question 8, Email marketing.
Can you describe what non-gift activation is, and how it specifically relates to email marketing functionality that you require.
We are seeking a system that will automatically generate an email for individuals who lapse on their annual gift to a particular program. For example, a donor made a gift in October of the previous year but did not make the same gift in October of the current year. An email would be generated to invite the donor to make the gift.
3. Commerce section. 'Allows multiple fee types and add-on's'. Please provide more description as to what exactly you are looking for.
For example, when we have an event that has multiple activities with varying charges, giving our registrants the opportunity to select those that interest them.
4. Commerce section. Campus Crowdfunding Platform. Are you referring to a specific platform? Or simply the ability to create crowdfunding campaigns within the alumni community platform?
The ability to create crowdfunding campaigns within the alumni community platform.
5. Data Management section. What is the USI Factbook? What specific features/design/functionality are you interested in comparing?
<https://www.usi.edu/planning-research-and-assessment/usi-fact-book/>. **No comparison, just alumni facts available online. See link to USI factbook/.**
6. How many events do you plan on having?
It varies from year to year.
7. What type of jobs are you looking to post? Are they campus jobs or external jobs from different companies?
External.
8. We want to know clients of iModules who:
Approximate number of programs per year 25 to 30 programs, this number does not include email marketing and newsletters.
We deploy more than 500 messages in a year.
Approximate number of participants served per year.
Alumni populations is 43,000.

9. How many users will be using this new Advancement CRM system?
Five. How many would need access to the Marketing solutions? **Five.**
10. What existing system will this new Advancement CRM system be replacing?
iModules.
11. Besides interfacing with Banner, how many other systems will need to integrate with this new Advancement CRM? What are they?
None.
12. How many total constituent records will need to be migrated to this new Advancement CRM?
45,000.
13. How many contacts would be in your email database?
Less than 30,000.
14. How many emails do you send annually?
500+
15. How many different business units would you ideally want within your marketing solution?
2 to 6
16. How many social media accounts does USI Alumni manage per platform? (Facebook, Twitter, Instagram, etc?)
Six.
17. Can you share a little more about the virtual mentoring need? What types of interactions do you need for the mentor/mentee to have? How are you currently facilitating this process?
Virtual program is not in place. Looking for platform where alumni and students can network with each other for one time interactions or multiple interactions.
18. Is Gift Processing functionality a requirement for new CRM System?
Commerce functionality, and gift processing functionality if Development office is interested in the software
19. Is Prospect Management functionality a requirement for new CRM System?
If Development office is interested in the software.
20. What is the proposed budget for this project for licensing? What is the proposed budget for Implementation?
Software budget \$20,000.