



February 19, 2020  
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FROM: Dan Martens

Director of Procurement  
812 464-1847  
812 461-5275 Fax

*Dam*

SUBJECT: 20-22-10001-02040  
Banner Advancement CRM Replacement Software / Due 2-28-20/2PM/Local Time

Addendum #1

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

See attached for answers to questions submitted.

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

DM/bw

**Procurement**

8600 University Boulevard • Evansville, Indiana 47712 • (812) 464-1847 • FAX (812) 461-5275

## Questions & Answers

1. Please provide your annual gift matching.  
Annual gift matching varies between \$25,000 and \$30,000.
2. How are you currently using Evisions FormFusion?  
USI uses FormFusion to embellish output from Banner including the addition of graphics as well as data from the Banner database. Examples of these embellished outputs include pledge reminders, gift receipts, and letters for matching gift donors.
3. Do you currently integrate with Banner Financial Aid?  
Yes.
4. What scholarship management business requirements are you looking to support?  
USI is in need of a scholarship management module that can host a unified scholarship application, connect scholarships to scholarship recipients, and provide an accounting feature that prevents instances of over-awarding.
5. Please provide more information regarding the following requirement. What would you like to accomplish? *Can the system support Fund ID for scholarship processing? Special lead digit (5) for scholarship processing. Special lead digit (9) for fund processing.*  
Currently, each scholarship has a name and fund number for identification purposes. USI needs a system that can support individual scholarship names and fund numbers for each named scholarship. The special lead digit (5 code) is used for identification when transmitting information to the Financial Aid Office and the Bursar's Office. Each named scholarship is given a 5-digit code that is used for identification in placing the scholarship on a student's account.
6. Please provide more information regarding this requirement. What fee types and add-ons? *Allows multiple fee types and add-ons?*  
This question pertains to event registrations. The requirement is that for an event (e.g. Homecoming) an individual can access one registration form and have the option to select from multiple activities (each of which may have a different cost associated with it).

7. Please provide the number of users needed for your Advancement CRM solution by key role, including but not limited to: system administrators, executives, fundraisers, alumni relations staff, records management, gift processors, prospect researchers, report writers, business analysts, etc.

It is difficult to classify USI's current Banner Advancement users into the categories above because the responsibilities of some individuals fall into multiple categories. Also, some users rarely use Banner Advancement and some only use it on an as needed or part time basis.

System Administrators – 5 (all on a part time/as needed basis)

Executives – 1

Fundraisers – 4

Alumni Relations – 2

Records Management – 13 (many of these are student workers or full-time employees who use Banner Advancement only part-time/as needed)

Gift Processors – 2

Foundation Accounting – 7 (separate USI department that uses the system like the Gift Processors)

Prospect Researchers – 1

Report Writers – 1

Business Analysts – 0

Auxiliary Access – 12 (infrequent users of Banner Advancement who have view only access)

8. Please confirm the version of Ellucian Banner software that will be converted from. How long has this system been in place? How many years of giving history?

Banner 9.3.6.0.7 and database 8.12.0. USI went live with Banner Advancement in July 2005.

The first gift to the USI Foundation was on 1/1/1969 so 50+ years of giving history.

9. Please provide the number of users by job function. (# of major gift officers, # gift processing staff, # executive level, # IT/technical, etc.) or alternatively do you have an organizational chart and list of employees by title who will be accessing the system?

See question #8 above.

10. Any 3rd party vendor access? (mail houses, agency, caging/fulfillment).

No.

11. Describe the integrations that are required? Are they true integrations or file feeds? Will you need any campus partners or collaborators to participate (i.e. staff from HR, Finance or central IT).

Considering that Banner is an integrated product and that USI uses Advancement, Student, Financial Aid, Human Resources, and Finance, some form of integration will be required for the Foundation to maintain status quo. Real-time integration or daily batch file feeds could be used. Central IT will be heavily involved in the implementation and the data managers for the Banner modules listed above will be contacted as needed throughout the process.

12. Do you plan on having non-staff users (e.g. volunteer access)?

No.

13. Describe your current reporting environment.

Banner data in the USI Oracle database is copied nightly to the Banner Operational Data Store (ODS) which is then accessible via IBM Cognos Analytics Business Intelligence software. The Banner ODS is not a true data warehouse but a point in time repository of denormalized Banner data. The ODS consists of Ellucian supplied views, USI defined views, and copies of Banner tables. Cognos is used for ad hoc and scheduled reporting. Users have the ability to run reports built by a report writer or to request reports as needed. All mailings (which could have multiple criteria) are based on reports built in Cognos. Daily and weekly edit reports to find data entry errors are sent from Cognos to data entry specialists. Also, gift and pledge data from the Banner Advancement module is frozen once per month and used for reporting.

14. In addition to the current existing Banner database, are there any ancillary databases or data sources that need to be considered for conversion?

No.

15. What is the fiscal year for USI? Is budget approved and in place for the purchase and implementation of a new system in the current fiscal year for USI?

July 1 – June 30. University administration approved a budget of up to \$70,000 for RFP purposes. No, a budget for the purchase and implementation of a new system has not been approved for the current fiscal year.

16. Bids are due February 28<sup>th</sup>. Can you explain what the next steps in your search process are (narrowing down of vendors, onsite demos, etc)? Also, do you have dates for the steps including final vendor selection, project start date, and "go live" date?

A committee will review responses to the RFP using criteria to narrow down the list of vendors. The current plan is to have five vendors or less invited to campus for onsite demos. We would like to view demos by the end of the current fiscal year and move to final vendor selection at the start of the 2020-2021 fiscal year. At this time, we have not determined a project start or "go live" date.

17. How many vendors have been invited to participate in the USI search? Please list by company name and product being considered.

This RFP is open to all vendors and does not require registration to submit a bid.

The RFP has been posted to our public website and can be found at:

<https://www.usi.edu/procurement/competitive-bids-results>.