Questions regarding Fundraising & Donor Management Software RFP
Part 1

Question: Would like to know whether your team is exploring the use of a pre-established management platform, or if you might be open to the idea of a fully custom-built solution—one tailored precisely to fit your workflows, priorities, and long-term goals.

Answer: The Library would be open to exploring both options, with the understanding that any platform would need some level of customization in order to fulfill our needs.

Question: Is it possible to extend the RFP deadline?

Answer: At the current time, there are no plans to extend the deadline.

Question: Can you provide additional details on the timeline? Ie. when will we receive responses back to questions, demos, interviews, selection period, go-live date, etc…

Answer: Responses are due July 18, 2025 by 11 am. Proposals will be reviewed July/August. The goal is to migrate and the system be fully functioning by the end of 2025.

Question: Is there a specific platform(s) you are leaning towards? If yes, which one and why?

Answer: No. The Library is open to all options.

Question: What is the approved or anticipated budget range for licenses, implementation, and ongoing support? Is the budget inclusive of change management, staff training, data migration, and integrations?

Answer: The Library is in the planning stages and looking to align budget expectations based on the value, scope, and recommended approach you provide. We're open to reviewing different pricing models as part of your proposal.

Question: Are there any funding constraints or grant dependencies related to this project?

Answer: There are no specific funding constraints or grant dependencies at this time, but we are committed to making fiscally responsible decisions and ensuring strong ROI.

Question: Are there any systems that you plan on retaining that will need to be integrated with the new CRM?

Answer: No.

Question: Please list your current tech stack (CRM, registration system, communication tools, payment processors, etc.)

Answer: Our current tech stack includes CRM, online donation processing, payment processing, and email/communication systems.

Question: What key metrics are you tracking and focused on improving throughout this project?

Answer: Key metrics include donor engagement, donation tracking and cultivation.

Question: Are your current state processes already documented, or do you require your current state to be mapped out in this solution?

Answer: Processes would need to be mapped out.

Question: Is there a desired "go live" date for the migration? Will your legacy system be shut off at a certain point? If yes, when?

Answer: The goal is to migrate and the system be fully functioning by the end of 2025. The current system is only available until the end of February 2026.

Question: Which business units and stakeholders within BECPL are being considered for this digital transformation?

Answer: The internal units involved in this project are the Development & Communications and IT departments. External units are donors and funders.

Question: Can you provide a detailed breakdown of the evaluation criteria and their respective weightings that will be used to assess proposals.

Answer: Proposals will be evaluated on overall security, ability to access and report on data, ability to customize, ability to configure and integrate library data with ease from current donor management software, after training with little to no vendor interaction, ease of training and simplicity/ease of overall user experience. Weightings are not available at this time.

Question: What systems or databases will need to be migrated into the new CRM?

Answer: The current CRM, online donation processing, payment processing, and email/communication systems. Data may also need to be uploaded from our library cardholder database (SIRSI).

Question: What data quality or duplication issues exist in the current system?

Answer: There are duplicate records in the database that have not been combined due to the inability to verify information (ie. change in mailing address, etc.)

Question: Are there compliance or privacy considerations we should know about regarding existing data?

Answer: All data is strictly confidential and cannot shared or sold.

Question: Can you please share the data volumes that need to be migrated to the new solutions? Approximate number of:
1. Constituents
2. Records
3. Tables
4. Attachments (with average/total file size)

Answer: Numbers are as follows:
1. Constituents – 67,000
2. Gift Records – 43,000
3. Campaigns – 18
4. Funds – 154
5. Appeals – 60
6. Queries – 30
7. Reports – 10
8. Acknowledgement templates – 15

Question: Are you currently hosted on-prem or cloud based, and is a specific infrastructure preference in place for the new CRM?

Answer: A cloud-based system is currently being used.

Question: Will your team be able to provide data mapping or field definitions, or will this need to be discovered collaboratively?

Answer: This will be a collaborative process.

Question: Does constituent data include historical personal information (Ex. Birthdays, Year of Graduation, etc.)?

Answer: Constituent records can include marital status, spouse/partner name, Library employee or board member, and preferred pronouns. Birthdays and ages are currently not included.

Question: Does BECPL prefer a single load or phased approach?

Answer: A single load approach is preferred.

Question: Does BECPL want a 'Mock Run" - in other words, before Go-Live, a Mock Run can be performed to ensure all aspects of the data migration are adequate for Go-Live.

Answer: Yes.

Question: What types of reports do different departments rely on?

Answer: The donor management system is only utilized by the Development & Communications team. The department relies heavily on financial reporting.

Question: How frequently are reports run?

Answer: Depending on the report, it is either weekly, monthly or quarterly.

Question: What reports are working and not working for your org and each dpt?

Answer: Donation reports, annual fund reports and online transaction reports are the most frequently used and work well given the Library's needs.

Question: Are reports required to be shared with users outside of the system in use? (Ex. emailed out)

Answer: No.

Question: What technology platforms are you currently using for Marketing (Email or SMS) and Reporting?

Answer: NetCommunity

Question: Is ~100,000 the total contact population you will be communicating with in the new system? Is this total broken down into multiple distinct audiences and, if so, do you separate these efforts into different workspaces/teams today or are they a shared responsibility?

Answer: Currently our listserv is approximately 100,000 that can be broken down based on library location and donor status. These lists are shared amongst the Development & Communications team.

Question: What is the estimated number of emails the different groups will send monthly (i.e. 1 email sent to 10,000 recipients would be 10,000 emails)? What is the maximum amount of emails you would ever send in a single day?

Answer: 100,000 emails

Question: Of your total emails, what is the approximate breakdown between Commercial and Transactional sending?

Answer: All emails include program promotion, as well as a call for financial support.

Question: What data points are most commonly used for marketing audience segmentation? In which systems does this data exist today and which team(s) own the segmentation process?

Answer: Audience segmentation can be based on library cardholder, past event/fund support, and past gift level. Development & Communications team is the only one with access to the segmentation process and list.

Question: Which regulatory or compliance requirements apply to your Marketing data as you use it today or how you plan to use it in the future? Is any specific level of Encryption required for Marketing data? Do you have any existing processes for limiting PII data within Marketing databases?

Answer: The Library uses NetCommunity in conjunction with our fundraising and communication efforts. Marketing data handling is subject to regulatory and compliance standards as set forth by the Federal and New York State government. NetCommunity encrypts data in transit using HTTPS/TLS protocols.

Question: Do you currently utilize list-level subscriptions in your current platform? If so, how are these tracked?

Answer: No.

Question: How do you capture and track Email or SMS preferences (eg opt-in vs opt-out) today?

Answer: NetCommunity automatically tracks that information and will process the requests to opt-out from the email listserv.

Question: Are there any automated journeys or triggered processes that you currently use for sending emails? If yes, please state some of the examples; notably those that will be critical in your new system(s).

Answer: The only automated response/journey that happens currently is a donation receipt. The Library is open to other automated options.

Question: Is any Direct Mail marketing currently performed internally or through a direct mailing service? Is there any current or future need to integrate those efforts with your new system(s)?

Answer: Yes. A direct mail service is contracted for an annual appeal. There are no current plans to integrate that process.

Question: If sending SMS texts is of interest, are you looking for 1-to-many (e.g. mass/broadcast) or one-to-one (conversational) capabilities, or both? If yes, how many SMS/texts do you plan on sending?

Answer: Yes, a 1-to-many option is preferable. Since this is a new option the Library is exploring, there is no set plan on the number of messages that would be sent.

Question: If advertising is of interest, what platforms are being used to advertise on (e.g. Facebook, X (Twitter), Instagram, Google, etc.)? How are advertising audiences being generated and uploaded to these platforms today? How often are these audiences refreshed? Does an agency support your advertising efforts?

Answer: NA

Question: If web personalization and behavioral monitoring is of interest, what CMS platforms do you use (e.g. Wordpress; Drupal; etc.)? What web analytics provider do you use today (e.g. Google Analytics; Adobe Analytics; etc)?

Answer: NA

Question: Are there any current Marketing web forms that would need to be migrated to continue to capture new subscribers?

Answer: There are donation forms that would need to be migrated.

Question: Are engagement metrics tracked today? What KPIs / metrics are most important towards measuring Marketing performance?

Answer: Currently the only metrics that are tracked is open rate and click through rates.

Question: Do you currently track grants in another system?

Answer: Grants are minimally tracked in the current CRM system. No other tracking system is used.

Question: What data points do you track for grants (e.g. funder, deadlines, reports, restricted uses etc…)?

Answer: Data points that are tracked include funder information, grant funds, and program designation.

Question: Do you require workflows or reminders for reporting deadlines or renewal dates?

Answer: While it is not a requirement, it would be an option the Library would explore.

Question: Do you have any outgoing grants? If so, what is that process and how is that process tracked?

Answer: No.

Question: Do you require data residency in US or specific regions?

Answer: Must be within the US.

Question: Do you have any regulatory requirements that must guide security or data storage?

Answer: All donation and donor information is confidential. We do not share lists with other organizations.

Question: What real-time integrations are critical ie. payment processors or event platforms?

Answer: Payment processors are critical.

Question: What payment processors are currently used? Is there a preferred provider?

Answer: Merchant Services is currently being used. There is no preferred provider.

Question: Do you ever provide refunds? If so, what types of refunds are typically issued and how are they approved/processed?

Answer: Yes, occasionally refunds are provided. Refunds are approved and issued at the discretion of the Development & Communications team.

Question: Are there any scenarios involving installment payments or split payments?

Answer: The Library only has recurring gifts. Installment payments and/or split payments are not supported.

Question: Do you plan to integrate your online store, event ticketings, or library fines in the same system?

Answer: Fundraising event ticketing yes, all others no.

Question: Does the online store need to be integrated with the new CRM?

Answer: No.

Question: What are the most common donation types (online, recurring, major gifts)?

Answer: Individual donation (sent via USPS) and online giving.

Question: How do you handle matching gifts, in-kind donations, and tribute gifts today?

Answer: All gifts are entered into the CRM system under the corresponding fund designation. Gifts are soft credited when necessary and acknowledgments are processed.

Question: Do you manage restricted and unrestricted gifts separately?

Answer: No, they are processed the same.

Question: Do you currently track donor lifecycle stages?

Answer: No.

Question: Does the BECPL provide grants out to other libraries in the network? If so, what does that process entail and do those libraries need to login to see status and provide updates?

Answer: No.

Question: How many grants is BECPL applying for on an annual basis and is it through the year?

Answer: 10 or less.

Question: Would it help to have support in seeking grants?

Answer: Yes.

Question: Where are grants currently tracked?

Answer: A combination excel spreadsheet and CRM is currently used to track grants.

Question: Are there any tools currently in use for the generation of documents such as acknowledgement letters?

Answer: Currently, lists are exported from the CRM system and mail merged into letter templates.

Question: Do you currently have a change management strategy and team in place to support the major changes both staff and students will face?

Answer: Changes would be incurred by the Development & Communications team only.

Question: Do you have enough staff/resources to define and deliver change management?

Answer: Yes.

Question: How do you currently train staff/volunteers on the system?

Answer: Staff is trained using online training tools including webinars and pre-recorded trainings.

Question: How will you measure adoption and success of the new system internally?

Answer: Success will be measured by the platform being secure, with ease of use to access and report on data, configure and integrate library data with ease from current donor management software. Training should be informative and the assigned project manager informed and available.

Question: How are constituent codes and attributes currently used in Raiser's Edge? Please describe their purpose, how many are typically assigned to a constituent, and whether they are used for segmentation, reporting, workflows, or other processes.

Answer: Constituent codes are used to identify a constituent's relationship with the organization. A single constituent may have multiple codes assigned to them. Examples of constituent codes include: donor, online donor, program attendee, staff/volunteer and board member. These codes are used for segmentation and reporting. Attributes are used more sparingly, often to denote how a constituent responded to a recent donor survey to indicate the level of importance they place on giving to the Library. Another example of an attribute is to denote if a constituent give to a specific category, such as if they have designated their donations to go toward new technology.

Question: Are constituent codes and attributes used together or independently? Are there any known overlaps, redundancies, or challenges in how these data sets interact?

Answer: Constituent codes and attributes are used together and independently. Constituent codes are utilized more frequently. There are no known overlaps, redundancies or challenges in how these data sets interact.

Question: What are the key types of constituent attributes in use? Are they primarily descriptive, transactional, or segmentation-driven? How frequently are these updated, and by whom?

Answer: Constituent attributes in use are currently primarily descriptive. Staff update these attributes on an as-needed basis.

Question: What governance or data quality controls exist for constituent codes and attributes? Are there known inconsistencies, duplicate uses, or cleanup needs we should anticipate?

Answer: There are no known inconsistencies, duplicate uses or cleanup needs to anticipate. Constituent codes and attributes are updated on an as-needed basis, based on the individual constituent's donor history and needs.

Question: Has your organization begun categorizing data for migration? Have you identified which codes and attributes should be kept, combined, or retired as part of the transition?

Answer: The Library has not begun categorizing data for migration.

Question: What relationship types are currently tracked? Please describe key relationship types (e.g., household, employer, family, volunteer) being used in Raiser's Edge.

Answer: Key relationship types currently being used in Raiser's Edge include spousal/household relationships and limited company relationships, such as if a company makes a matching gift in correspondence with a donor.

Question: How are relationships used in current processes? For example, do they drive soft crediting, household giving summaries, or communication preferences?

Answer: Relationships are used for soft crediting as well as for communication preferences, to limit duplicative communications.

Question: What is the current state of relationship data quality? Are there known gaps, duplicates, or accuracy issues that would require cleanup or transformation?

Answer: There are no known gaps, duplicates or accuracy issues that would require cleanup or transformation.

Question: Do you plan to migrate your entire dataset or selectively archive legacy/inactive data? If selective, what criteria will guide your decision?

Answer: We plan to migrate our entire dataset.

Question: Have you performed an inventory of any of the "trickier tables" in Raiser's Edge, such as phone types, salutations, aliases, and custom attributes?

Answer: We have not yet performed an inventory of these tables.

Question: Have you identified any internal stakeholders or end users who need to be involved in validating data decisions and migration priorities?

Answer: As primary users of the software, the Library's Development & Communications staff will be need to be involved in validating data decisions and migration priorities.

Question: Can you share the technical capabilities of your team? Who is the database administrator for RE? What technical capabilities do they have on that system?

Answer: The Library's Development Manager is the current database administrator for Raiser's Edge. Staff utilizes Blackbaud's Knowledgebase as well as intermittent one-on-one assistance, along with an internal IT team, on an as-needed basis for problem-solving.

Question: What do you currently use for credit card processing? Is this something you are open to migrating?

Answer: NetCommunity with Blackbaud Merchant Services is currently used for credit card processing. The Library is open to migrating to a new platform based on integration with a new system.

Question: What does success look like in this project for the library?

Answer: Success will be measured by the platform being secure, with ease of use to access and report on data, configure and integrate library data with ease from current donor management software. Training should be informative and the assigned project manager informed and available.

Question: What are some of the current pain points for causing the need to change?

Answer: Need ease of use. Expiration of current contract.

Question: Can you share the structure of your Raiser's Edge v7 data—e.g., custom fields, segmentation, custom objects—so we can assess the complexity of migrating ~65K constituents, 39K gifts, and campaign/fund codes?

Answer: Fields: Name, address, city, state zip, email, phone, donation level, past donations, event attendance, library cardholders, businesses, foundations, bequests
Funds: yearend, annual, bucks for books, several special events, in-kind, recurring

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Question: Are you able to export the data you need from Raiser's Edge via a CSV file?

Answer: Yes

Question: Do you require migrating historical email interactions, events, and grant histories, or only core gift and constituent records?

Answer: Yes, some historical event and grant histories will require migration.

Question: What is your strategy for duplicate detection and merging? Should we automate based on specific criteria or surface potential duplicates for manual review?

Answer: We would like to remove duplication and determine the best criteria before the process begins. Merging should not be automated but should be surfaced for manual review.

Question: What roles and permission levels (e.g., admin, gift processor, grant manager, volunteer coordinator) are required within the system?

Answer: System Administrator, CRM Administrator, Apps Administrator, Payment Administrator, Gift Processor

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Question: What types of fundraising events are you organizing—donor dinners, auctions, peer-to-peer? Should the system support RSVPs, attendance, and donation attribution?

Answer: Special events, happy hours, speakers, ticket sales for offsite events. There should be a tracking component within the system for these events.

Question: Do you currently use Mailchimp, Constant Contact, or a specific email provider?

Answer: NetCommunity is currently used for mass emails.

Question: Will you require automated workflows for thank-you messages, welcome sequences, or event confirmations? Should emails be responsive and branded?

Answer: Yes, and yes.

Question: What is your process for generating and sending end of year gift receipts (email vs. print)? Should the system support mail merge or document generation?

Answer: Currently, data is exported from RE via a query and inputted into Microsoft Word through a manual mail merge. Printed gift acknowledgments are sent for any donation, typically through US mail, but may be sent by email upon donor request. It would be ideal if the system supported mail merge and/or document generation.

Question: Today how do you handle recurring gift schedules and automate acknowledgments upon receipt?

Answer: Recurring gift schedules are automatically made based on the donor's preference through our system. Printed acknowledgments are sent to the donor via US mail.

Question: How many recurring donors do you have? What or have you thought about the transition plan for these recurring donors? Will RE give you access to the credit card tokens to migrate into a new giving platform?

Answer: There are currently have less than 100 recurring gifts. For security purposes, we would not migrate those tokens to a new system. The Library will contact the recurring donors separately to renew their donation.

Question: How important is it for your platform to reduce transaction or platform fees to donors or recipients? What is your current transaction fee cost?

Answer: It is very important to keep the fees as low as possible. Our current system now offers the option for donors to cover the transaction fee, which is minimal.

Question: Do you want donors to be able to view past giving, or download receipts through a donor portal?

Answer: Yes and yes.

Question: What Accounting Software do you use to manage your chart of accounts/ ledgers?

Answer: We currently use RE software to track donations. Our Business Office uses other software to track budgets and expenses.

Question: How does your system support fund/campaign/appeal hierarchies?

Answer: All donations are allocated to a campaign (ie. 2025, 2024), fund (ie. general, annual appeal) and appeal (ie. fall mailing).

Question: Do you do any direct mail?

Answer: Annually, we typically have two direct mail campaigns to solicit donations.

Question: What KPIs matter most—donor retention, giving frequency, campaign ROI? Do you need real-time dashboards and filtered views by fund or program?

Answer: KPIs that matter include campaign ROI, integrity of the list, donor retention. Yes, we need real-time dashboards and the ability to filter views by fund or program.

Question: Will you use native Salesforce tools or integrate with platforms like S-Docs, Conga, or DocuSign to manage letters, receipts, and appeals?

Answer: We do not use any of the platforms mentioned.

Question: What level of post-implementation support is expected (e.g., helpdesk, admin training, system updates)? What SLA is required?

Answer: Post implementation support needed - help desk and system updates. SLA - will be a formal contract/agreement that defines the expected level of service and pricing.

Question: Do any staff or volunteers need offline access for registrations, check-ins, or donor engagement in low-bandwidth settings?

Answer: Rarely, if at all. Volunteers do not need any access.

Question: Should we configure data access based on roles such as library staff, fundraisers, volunteers, and board members?

Answer: We will work together to configure data access points based on staff roles. Volunteers and board members do not access any data.

Question: What is your desired go-live timeline and project milestones? Is a phased rollout or pilot program required?

Answer: Before yearend 2025 is preferred. Pilot program required. Project milestones will be determined based on time of year the system goes live.

Question: What is your budget across the three years knowing the first year will cost more with implementation and migration? This will help us scope the level of effort appropriately.

Answer: The Library is in the planning stages and are looking to align budget expectations based on the value, scope, and recommended approach you provide. We're open to reviewing different pricing models as part of your proposal.

Question: Does the library have in house I.T. staff?

Answer: Yes.

Question: How do you manage volunteers today? Do you manage them out of RE?

Answer: Volunteers are not managed through Raiser's Edge.

Question: What types of library programs (e.g., Summer Reading, genealogy classes, maker space, early literacy) should be tracked in Salesforce?

Answer: None. This software is not used to track programming.

Question: Will the library continue using existing tools like LibCal, or should the new system manage RSVPs, attendance, and feedback?

Answer: We will continue using LibCal for public programs. The new system may track RSVPs for fundraising events only.

Question: How should the system manage recurring events (e.g., weekly storytime) differently from one-time events (e.g., summer kickoff)?

Answer: NA

Question: Are there any co-branded events or campaigns with the library where donations are routed through a giving platform?

Answer: On occasion, yes.

Question: Should the system track volunteer hours or shifts related to library events or fundraisers (e.g., Great American Book Sale)?

Answer: No.

Question: For programs like 3D printer certifications, should participant progress or outcomes be stored in the new system?

Answer: Not applicable.

Question: Do you want to measure which programs (e.g., literacy initiatives) drive donations or repeat engagement?

Answer: This software is not being used to track programs.