



Questions regarding Fundraising & Donor Management Software RFP Part 2

Question: Are there other features being used in Raiser's Edge for which data will need to be migrated apart from the constituent management, gift records/donations management?

Answer: Queries, batches, reports will need to be migrated as well.

Question: Are you currently using an alternate system from Raisers Edge as an online giving tool that accepts the payments, and if so, which is it? Are you open to keeping this tool and having it integrated with the recommended platform/solutions?

Answer: Currently the Library uses NetCommunity for our online donation pages. Donations are processed through Blackbaud Merchant Services.

The Library also has a separate online system for patrons to pay for lost materials. This is unrelated to the online giving portal and on a different platform and will not need to be integrated.

Question: Can multiple systems be used to satisfy the overall solution? For example, can we recommend a CRM/donor management solution plus separate online giving/event system that will need to be integrated?

Answer: Yes. If multiple systems are recommended, those systems must be able to be seamlessly integrated.

Question: You mentioned Grant Writing and Tracking? Which system is being used for grant writing and tracking currently and will data for grants need to be migrated from that system? If so, how much data?

Answer: Grant writing research and tracking is kept manually. Currently, approved funding from granters is inputted into Raiser's Edge as a donation upon receipt of the funds.

Question: You mentioned Event Management. Can you elaborate more on what type of events are managed and the expected number of events each year, including expected number of attendees. Will data for events need to be migrated to the new solution? If so, how much data?

Answer: Anticipate 3 – 6 events annually, including offsite fundraisers such as ballgames, speaker events, and cocktail receptions. Management will involve reservation/ticket sales, payment, confirmation, acknowledgment back to donor, possible auction management and all that involves, and generating internal reports per event including name of attendee, number of attendees, sponsorship level, and additional donations – if any, on top of paid admission.

Question: The Pricing and Signature Page only asks for one-time charges. Where should we record recurring charges/subscriptions-based licensing, if needed, for the cloud system(s)?

Answer: Please add this information as an attachment at the end of your response.

Question: What was the process like when the Buffalo and Erie County Public Library implemented Raiser's Edge? How long ago was that project?

Answer: Raiser's Edge was the first donor management system the Library ever had. Prior to that all donations were recorded using Microsoft Excel. Implementation of Raiser's Edge was done in 2009/2010, preceding any current staff.

Question: Will the Library Foundation of Buffalo and Erie County be included in this project? How do they track donors? Is there any data sharing with that group?

Answer: No, the Library Foundation of Buffalo & Erie County will not be included.

Question: How many individual users does the library expect to use the system?

Answer: Five.

Question: Is there a budget for this engagement that you can share?

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: Do you have a moves management strategy? If so, please share.

Answer: No. Currently, the Library's fundraising is mostly passive. There is no firm cultivation or stewardship plan.

Question: Can you describe the quality and cleanliness of data?

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: Does the system need to be enabled for multiple languages?

Answer: No.

Question: In general, how well are the current-state functional processes documented?

Answer: There is limited documentation of processes.

Question: Are there other products or tools being used at the library that would require an integration? If so, can you send over your current technical architecture diagram? Specifically what is being used for mass emailing?

Answer: The tools that are currently used are: Raiser's Edge (CRM), NetCommunity (online donation pages and mass emails) and Merchant Services (processing online donations).

Question: What is being used for event management today? What features are required?

Answer: Currently, the Library uses a combination of Raiser's Edge and Microsoft Excel for event management.

Management will involve reservation/ticket sales, payment, confirmation, acknowledgment back to donor, possible auction management and all that involves, and generating internal reports per event including name of attendee number of attendees, sponsorship level, and additional donations – if any, on top of paid admission.

Question: Is there a peer to peer solution being used today?

Answer: No.

Question: How many grants are being tracked and processed? How is your current solution being used to support grant writing? Are grant outcomes being tracked?

Answer: Annually, the Library applies for 10 or fewer grants. A combination Excel spreadsheet and CRM is currently used to track grants. Outcomes are not tracked.

Question: What is being used for data enrichment today?

Answer: We currently don't use a tool for data enrichment.

Question: How is prospecting done today?

Answer: We do not currently have a process for donor prospecting.

Question: Does the Library require offline batch entry of credit card donations?

Answer: No.

Question: Regarding the number of emails sent, is the library open to a strategic approach to reducing those numbers based on segmentation and thus sending more targeted emails to small groups of constituents?

Answer: The Library would be interested in the option of segmentation to send more targeted emails, but is also still interested in sending to a large group of constituents.

Question: How does the library keep track of project plans, documentation, decisions, and other project admin tools or processes?

Answer: The Development & Communications Department will be the only ones with access to the CRM, therefore the system will not have to track project plans, documentation, etc. relating to other Library departments.

Question: Who will be involved in this engagement from the Library? What are their responsibilities?

Answer: The Development & Communications Department. They are responsible for all fundraising and marketing of the Library.

Question: Who will manage this solution once the engagement is complete?

Answer: The Development Manager, in conjunction with the Assistant Deputy Director of Development & Communications.

Question: Will additional 3rd party vendors (if any) be involved in this engagement? What is their expected involvement?

Answer: Only if suggested by the vendor and at the discretion of the Library.

Question: How many years of historical giving or constituent data would you like migrated into the new system?

Answer: Approximately 16 years (since the Library began using Raiser's Edge).

Question: Is any historical data stored outside of Raiser's Edge (e.g., spreadsheets, other legacy systems)?

Answer: No.

Question: Are there any known data quality issues (duplicates, incomplete contact info, outdated records) that you'd like us to address during migration?

Answer: There are likely some duplicates, incomplete records, and outdated information.

Question: The RFP does not specify or require any particular integration or iPaaS (Integration Platform as a Service) tool. Does the Library have a tool in mind? Is the Library seeking advice on a tool purchase?

Answer: The Library does not have a tool in mind.

Question: How does the Library make decisions? How does the leadership make decisions about risks and recommended mitigation paths?

Answer: The Buffalo & Erie County Public Library is governed by an appointed Board of Trustees. Day-to-day decisions are made by the Library Director. Depending upon the matter, an Administrative team of experienced directors in the fields of marketing, finance, operations, human resources, librarianship, fundraising, technology, and public outreach make decisions that follow the Buffalo & Erie County Public Library's approved policies, strategic plan, mission, and vision statements.

Question: Do you envision staff creating their own reports, or should reports be pre-built and administered centrally?

Answer: Staff should be able to create and run their own reports. Pre-built reports such as donor reports or specific fund reports are welcomed.

Question: Outside of running donor and email reports, are you using Tableau or PowerBi for data visualizations? Would you like a service provider to scope design and build of that?

Response: We do not utilize Tableau or PowerBi for data visualizations.

Question: Do you have a middleware that you want us to utilize for integrations?

Response: No. Currently our system is cloud-based and does not need middleware.

Question: Please list all systems the CRM will integrate with. Also, state whether those systems will exchange data or just require single sign-on.

Response: We don't currently have any systems that integrate this way. Raiser's Edge handled everything internally on their end.

Question: Is there a single sign-on tool already in use that will need to integrate with Salesforce?

Response: No.

Question: Do you have IT staff who can be trained to manage the implementation and support users afterward?

Response: Yes. Our team typically learns systems during setup, and are happy to participate in any training offered. However, it is important that support beyond our IT team be available and not left completely up to that Library department.

Question: Are there any known data quality issues (e.g., duplicates, incomplete records) that vendors should be prepared to address during migration?

Answer: There are likely some duplicates, incomplete records, and outdated information.

Question: Can you provide a data schema or sample structure from Raiser's Edge v7 to better assess migration complexity (e.g., fields, custom data, or relationships)?

Answer: Fields we currently use in Raiser's Edge include:

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|-------------------------------------------------------|----------------|
| • Last name, first name, title, addressee, salutation | • Gift amount |
| • Address, city, state, zip, country | • Campaign |
| • Telephone number | • Fund |
| • Email address | • Appeal |
| • Constituent code(s) | • Reference |
| • Spouse | • Pay method |
| • Relationship – organizations | • Card type |
| • Gift type | • Cardholder |
| • Gift date | • Check Number |
| | • Check Date |

Question: Can you outline the different user roles and permission levels anticipated for the five (or more) concurrent users?

Answer: Roles will include:

Administrator – two people, highest level of access to everything.

Gift processors - two people, limited access to all data, responsible for daily processing of new donations, acknowledgements, and running reports.

Finance Department - one or two people, access to the financial reports if needed.

IT Department - one person. Limited access to donor information, access to backend technical changes, links and support.

Marketing Liaison – one person, limited access to donor contact information for the purpose of creating and sending segmented emails.

Question: Will any third-party stakeholders (e.g., volunteers, partner organizations) require limited access to the system?

Answer: No.

Question: Do you have a preferred payment processor or gateway, or should vendors recommend one?

Answer: You may recommend a payment processor(s).

Question: Are there any current compliance or PCI requirements vendors must adhere to for online giving?

Answer: In New York State, charitable organizations, such as ours, have specific compliance requirements, including those related to the handling of sensitive donor data. We are required to comply with Payment Card Industry Data Security Standard (PCI DSS) of which there are 12 core requirements that all merchants must adhere to such as - building a secure network, protecting cardholder data, managing vulnerabilities,

implementing access controls, monitoring and testing networks, and maintaining an information security policy.

As a third party vendor, you would be responsible for a significant portion of the PCI compliance.

Question: Can you provide specific use cases for event and grant tracking within your current or desired workflow?

Answer: Selling baseball game tickets with reserved seating, as well as selling special event tickets with open seating.

Question: Will your team require event registration and ticketing features?

Answer: Yes.

Question: What email platform(s) are currently in use, and do you expect integration with existing systems like Constant Contact or Mailchimp?

Answer: We currently use Blackbaud NetCommunity for mass emails.

Question: Is there a preference for built-in vs. third-party tools for mass email communications and campaign tracking?

Answer: No.

Question: Do you require data hosting within a specific geographic region (e.g., U.S.-based cloud servers)?

Answer: U.S. based cloud service is required.

Question: What is your ideal timeline for full system go-live, including data migration, testing, and staff training?

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: Will there be a designated team or point of contact from your organization to work with our project manager during implementation?

Answer: Yes. Implementation will be led by the Development Manager and Assistant Deputy Director of Development & Communications.

Question: Are tribute gifts, peer-to-peer fundraising, and data enrichment required at launch or intended as future enhancements?

Answer: Tribute gifts are required at launch. Others can be future enhancements.

Question: Is there any expected integration with external fundraising platforms or CRM systems?

Answer: Not beyond online donation processing system and donation pages on the Library's website.

Question: How many staff members will require training, and do you prefer on-site, virtual, or self-paced training options?

Answer: Approximately 6 staff members will need to be trained. Virtual with the option for self-paced trainings would be ideal.

Question: Will there be a phased rollout or is full adoption expected immediately post-implementation?

Answer: Goal is for full adoption immediately post-implementation.

Question: Can you provide more insight into how proposals will be evaluated (e.g., weight of pricing, functionality, vendor experience, support)?

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: Is a product demonstration or sandbox environment submission expected as part of the evaluation?

Answer: Yes.

Question: Beyond 24-hour breach notification, are there any additional compliance requirements (e.g., NYS regulations, data encryption standards) we should account for?

Answer: Requirements should follow federal and New York State regulations.