

# Missouri State University Foundation

## RFP Worksheet

Reference Number ID section note(s): This is the item tracking ID used by Missouri State University. Please reference this ID when requesting clarification or additional information for Vendor responses.

### Reference Number ID

#### **Security and Access Control**

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Security and Access Control

#### **Hosting and Hardware**

Hosting and Hardware

Vendor Hosted Solutions

Vendor Hosted Solutions

Vendor Hosted Solutions

Vendor Hosted Solutions

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University Hosted Solutions

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#### **Data**

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#### **Client Side requirements**

Client Side requirements

Client Side requirements

Client Side requirements

#### **Support and Maintenance**

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**Reporting**

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**General System**

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**Pricing**

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Pricing

**Advancement Support Functionality**

**Communications / Emailing**

Communications / Emailing  
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Communications / Emailing

Communications / Emailing

Communication / Integration

Communication / Integration

Communication / Integration

Communications / Texting

Communications / Social Media

Communications / Social Media

Communications / Social Media

**Events**

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Events / Integration

Events / Integration

**Donations**

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Donations/Reporting

Donations/Reporting

**Online Community / Members**

Online Community / Members

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Online Community / Members

Online Community / Members

Online Community / Members

Online Community / Members

Online Community / Members

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Online Community / Members

**Volunteer Management**

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**Forms Management**

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**Data Analytics**

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Data Analytics

**TOTALS**

**Application Functionality Need section Note(s):** When the term "Application" is used, it is referring to the Vendor's solution offering. When the term "Client" or "University" it is referring to Missouri State University.

Application Functionality Need

**Security and Access Control**

Describe available options for authentication.

Describe how users and related data are provisioned into the system

Describe how system complies with PCI-DSS, ADA, HIPAA, FERPA, and any other applicable regulatory or industry standards.

Describe your process for patching security vulnerabilities and communicating the vulnerabilities and security patches to customers.

Describe the security features of the system - how administrators and users are identified and their access controlled, how administrator access is logged and how respondent anonymity is protected.

Describe how data is encrypted in transit between the system and University users

Describe how data is protected at rest within the system.

**Hosting and Hardware**

Describe the options for hosting and the advantages of each

Describe the upgrade process (frequency, upgrade methods process, documentation provided, etc.) Also explain our options for reviewing the changes before they are installed in production.

Describe assistance needed from MSU Foundation IT and end user staff for resolving issues

Is there a development/test environment available?

Describe client (MSU) administrator access levels and methods.

Describe backup/recovery and disaster recovery processes and availability for the application and database.

Describe your software escrow plan: What if the company goes out of business or files bankruptcy?

Describe the hardware requirements.

Describe the operating system requirements (Windows, Linux, etc). Please include minimum and latest OS requirements (e.g. Windows 2008 minimum, Windows 2012 latest)

Describe database requirements and minimum and latest version requirements.

Describe vendor security and access requirements.

List required ports and protocols for firewall definitions.

Describe any unique requirements for backups (other than standard file system backups).

Describe the upgrade process (frequency, upgrade methods process, documentation provided, etc.)

**Data**

Describe the process you have for retrieving a full database dump from your system.

Include and/or describe a sample database dump from your system that is accessible by the Foundation

Describe data hosting services, including geographic locations.

**Client Side requirements**

What operating systems do you support?

What browsers do you support

Describe any proprietary client software needed

**Support and Maintenance**

Describe the routine tasks that will be required to maintain and use the software, both at the server and client. Identify the personnel requirements for maintaining the system in terms of skills, time, *etc.*

List and describe training opportunities for administration and support staff, including delivery and conference options.

Describe support hours and response priorities.

Describe support structure after implementation

### **Reporting**

What reporting is available through the interface?

Describe the pre-written reports/vehicles for analyzing the data.

Describe the process for writing/obtaining additional reports needed.

### **General System**

Describe the technology stack upon which your system relies.

Describe the interfaces and integrations that are possible and which are managed by the vendor.

Describe any delivered solutions for integrating with Ellucian's CRM Advance solution.

Describe options for importing, exporting and transferring data.

Describe the method of URL creation of the platform.

Describe the WYSIWYG editor

Describe any workflow capabilities included and describe the configuration options.

Describe the branding capabilities to adhere to University standards for cohesive viewing/web browsing and how it supports campuses with different branding guidelines.

Describe how redirects works within internal and external web pages.

Describe any chatbot features and functionality the system has

### **Pricing**

Describe all optional licensing models (named user, enterprise site license, *etc.* ).

Describe cost escalation caps.

Describe all optional features and associated costs, including additional third-party products, for each.

Describe any third-party software products necessary to meet the described requirements for this RFP. Include licensing fees and limitations for each.

Describe all support / maintenance options and associated costs.

Proposed fees must include any and all features described in the RFI.

### **Communications / Emailing**

Describe the types of communications available in the system.

Describe how mass email communications are sent using a hosted email provider.

Describe how each method of communication is created, updated, reviewed, scheduled, executed and retracted.

Describe how a template can be saved and used for easier email communication production.

Describe how videos and photos can be embedded in the platform using different communication channels.

Describe how to preview layout as seen on a mobile and on a desktop device and how those previews may be shared with internal stakeholders without going live.

Describe how emails are grouped such that a sub email rolls up to a main campaign category - example several emails roll up to a larger Homecoming campaign.

Describe how a From mailbox address can be stored in the system and used in emails.

Describe how recipients can reply to a specific inbox

Describe how an email can be scheduled with multiple future send dates.

Describe how an email can be A/B tested.

Describe how content can be dynamically constructed tailoring to a recipient's persona as defined in the system and/or CRM for recipient interest tracking, i.e. dynamic blocks based on segment

Describe how one or many recipients can be excluded or included to receive communication through a drip campaign (flow/automation/action-based communication lists)

Describe how a recipient can unsubscribe from email categories.

Describe system's ability to tag communications with one or more purposes, specifications or key values.

Describe how the tagging values are stored and categorized in the system.

Describe how the system tracks conversions both internal and external to the platform.

Describe how ad hoc recipient lists can be stored and updated in the system and added to emails as needed.

Describe how email responses/analytics are tracked (mouse placement, etc) to make future design decisions.

Describe how system, member and other variables can be employed within a communication.

Describe how recipients can be queued in email sends to throttle how many a recipient receives in a given time period. Describe how this can be overridden if necessary.

Describe how emails can be weighted or prioritized to throttle how many a recipient receives in a given time period.

Describe how recipients can be sent targeted communications based their actions taken (i.e. abandoned cart, etc...)

Describe administrator access to email responses such as clicks, conversions, spam, blocks, unsubscribes, watching, and reading.

Describe how other communication activity is logged in CRM Advance for recipient.

Describe the integration with CRM Advance when the recipient unsubscribe, marks email as spam or blocks the sender.

Describe email integration with Ellucian's CRM Advance. How are recipients from CRM selected, how are the email activities and responses stored in CRM?

Describe the texting features the platform provides

Describe how the system can match social profiles with actions taken

Describe any social media integration the platform provides

Describe how the system can host multimedia content, such as a podcast with videos.

## **Events**

Describe how an event is created, updated, previewed, shared for review, published and archived

Describe the use of event templates for ease of standard event creation.

Describe how a past event can be copied and updated for a new event.

Describe how an admin can search for an event in the platform

Describe how an event can be connected with an email communication.

Describe how an event can be tagged with multiple labels.

Describe the instances in which an admin would use HTML while creating/maintaining an event.

Describe ability to embed the event feed into an external web page

Describe how an event registrant registers for an event and updates registration.

Describe how an event registrant can provide and update guest information

Describe how a registrant can select different options for purchase for an event (like a shopping cart)

Describe how different registrants can pay for a portion of the event in case of a "party" or "group" registration

Describe how registrants and admins can register on behalf of someone else

Describe how event registrants and event administrators can check in attendees and guests during events

Describe the use of electronic tickets or QR code to event for registrants.

Describe how users can see other attendees or opt out of appearing on an attendee list

Describe any automatic event reminders sent to those who have registered.

Describe how events, registrants and participants are integrated with Ellucian CRM Advance.

Describe how mini bios for attendees could be obtained for event registrants through robust CRM integration

## **Donations**

Describe how an admin can create, update, preview, publish and archive a campaign page.

Describe how a template can be created and used for easier donation page production

Describe how the system categorizes campaign pages.

Describe how campaign URLs are created and customized for directing constituents to a campaign page

Describe how suggested donation dollar amounts are presented on different pages

Describe how a donation page can process payment for several different things in one transaction. For instance, items for sale, event registration and gift contribution.

Describe how a donation page can process a "round-up" feature in a event registration or item purchase where gift is collected.

Describe how designation options and lists are presented to the donor, include any descriptions of algorithms used based on donor's giving history, persona, etc...

Describe how a donor would donate from a campaign page in terms of giving one-time, making a pledge and setting up a recurring gift.

Describe how a donor can split a donation between multiple designations.

Describe the integration with digital wallets (Apple Pay, Google Pay, Samsung Wallet, Venmo, etc...)

Describe how a donor could text to give.

Describe how a donor requests anonymity.

Describe how a donor requests a refund of money

Describe how donors' cards are charged for recurring and pledge payments

Describe how an admin can update recurring or installment payment/donation information.

Describe how a donor can view, update payment/donation information and how they can request an update.

Describe how an admin can review canceled or expiring/expired cards and the reason

Describe how a donor is notified of an upcoming recurring charge or expiring credit card

Describe how a transaction can split a payment routing to two different gateways (i.e. Foundation bank account and a University bank account)

Describe how the system prevents data entry errors when setting up donation pages and events

Describe how a donor enters a gift in honor of another person

Describe how a donor enters a gift in memory of another person

Describe any crowdfunding capabilities or features are available in the platform

Describe communication support for crowdfunding

Describe how goal tracking for campaigns and crowdfunding can be viewed internally and externally

Describe how a donor can post their donation on a donor wall within the platform or on social media

Describe the system's eCommerce capabilities

Describe how the system integrates with Ellucian CRM Advance in terms of donations.

Describe how designations/accounts in the system are integrated with accounts in Ellucian CRM Advance and or Ellucian Banner Financial Services modules

Describe how this system integrates with Transact, Braintree and Authorize.Net systems (and other systems available)

Describe how donation pages can be coded with appeal/solicitation codes and campaign codes as defined in Ellucian CRM Advance

Describe the reporting available for donations, such as does it provide what dollars came from digital wallets and what dollars when to each bank account?

Describe how admins can review number of donations, distinct donors and total dollars raised by different data points (ex. by campaign, campaign category, based on fiscal year dates, etc...)

### **Online Community / Members / Membership**

Describe the various ways a member, donor, event registrant can log into the system

Describe how a member record is constructed, created and maintained.

Describe how a logged in member can update data in their profile.

Describe how an admin can toggle on/off data points for logged in members to view.

Describe how an admin can toggle on/off data points for logged in members to update.

Describe how a member can navigate the system

Describe how a member can upload their profile photo, enter class notes, business info, provide other updates in the system

Describe how an admin can review, approve, decline and publish submissions of photos, class notes, business info, etc...

Describe how an admin can search for members by different data points (ID, name, class year, degrees, colleges, etc.)

Describe how the system tracks changes to member records

Describe how members can identify interests that align with purpose tagging

Describe how the system handles donors, event registrants, etc...who don't log in

Describe how duplicates are identified, merged and records underneath the member are de-duplicated.

Describe the reporting features for membership data

Describe how a member requests their profile be hidden from public directory.

Describe the integration of members and member data with Ellucian CRM Advance

Describe how a member can upload info about their business and the directory where other members can view the submission

Describe any job posting capabilities within the system. How can these be reviewed, revised, published, and expired

Describe how members can reset their own password in the system

### **Volunteer and Group Management**

Describe how the system provides a space for volunteer groups where admins can share documentation and communication specific to the group

Describe how a group member can update a volunteer group's information and how an admin can review and reject or approve the update

Describe how an admin can turn on or off alerts for certain group to gain attention to event or program happenings, fundraising campaigns and volunteer opportunities

Describe how a volunteer can opt in and opt out of a group

Describe how the group can display volunteer leadership and individual volunteer status

Describe how an admin uses the system to send communications to a volunteer or volunteer group(s)

Describe how the system can integrate with CRM in regards to groups and volunteer opportunities and engagements

### **Forms Management**

Describe how an admin creates, maintains, reviews, publishes and deactivates forms.

Describe how a user submits a form.

Describe how a user updates or retracts a form.

Describe how an admin is notified of a form submission

Describe the reporting capabilities for a form and all forms

Describe the user's form journey from beginning to end

Describe the integration with Ellucian CRM Advance and forms

Describe how form data is accessed

## **Data Analytics**

Describe how email metrics, events and donation metrics data available for transfer to a dataverse/data lake

Describe data reporting, dashboards and export features. Describe how this can be done on a calendar year and fiscal (July to June) year.

Describe integration with Google Analytics

Describe how users/members can be scored on engagement within the platform and how that can be used or integrated with CRM

ment CRM/Services Application Replacement RFI Wo

**Application Functionality Codes (AFC) section note(s):** This section is **mandatory** to be filled out with appropriate code from the Functionality and Vendor Response Code Key, Vendor

Vendor Response Code



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Worksheet

**Comments and description of functionality.** This column is **mandatory** for any Vendor Response Code other than 'S' or in which additional cost or effort is required by Missouri State University. Attach additional information if necessary.

Detail comments related to Vendor Response code



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RFP Reference Number:

RFP Date:

**Cost to Modify section note(s):** Any functionality not having Vendor Response Code of not 'S' it is **mandatory** to provide

Cost to Modify

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**Implementation Impact section note(s):** It is **mandatory** to note any impact to Implementation schedules, additional costs or anything that could affect the project implementation schedule or

Implementation Impact

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