Date: 29 July 2025

To: All Potential Bidders

Subject: Addendum No. 1 | Q&A

Bid: 25-023 Donor Prospect Research Platform

UPDATE: THE DEADLINE TO SUBMIT PROPOSALS FOR RFP 25-023 HAS BEEN EXTENDED

THE OPENING WILL NOW BE HELD ON
AUGUST 13, 2025 AT 2PM CST

1. Could you describe your current donor prospect research methodology, including any existing tools, software, or manual processes your Development team utilizes? This would help us understand the transition requirements and potential integration points.

   ➥ We currently utilize Blackbaud ResearchPoint in conjunction with WealthPoint, and have also integrated Prospect Insights Pro with Blackbaud.

2. What specific challenges or limitations in your current donor prospect research activities is this platform intended to address? Understanding these pain points will allow us to tailor our solution to directly impact your most critical needs.

   ➥ The primary challenges include the lack of comprehensive individual prospect wealth profiles and inconsistencies in wealth data.

3. How does Troy University plan to measure the success of this platform? Please share any specific metrics (such as donor conversion rates, average gift size, efficiency gains, and new donor identification) and the timeline for evaluating these metrics post-implementation (e.g., after UAT, quarterly, annually, over multi-year periods).

   ➥ To effectively measure the success of a wealth prospect profile research system, key metrics will include data accuracy, prospect engagement, qualification rate, conversion rate, wealth indicator correlation, and data completeness. Additionally, through quarterly reviews, monitoring the time to identify major donors, return on investment (ROI), prospect rating and scoring effectiveness, retention rate, and system usability will provide a comprehensive view of performance.

4. Please identify the primary internal stakeholders who will be using this platform directly or benefiting from its insights. Understanding the roles involved (e.g., Gift Officers, Research Analysts, Leadership, Data Analysts) will help us design appropriate user experiences and reporting capabilities.

   ➥ The Advancement Services team, including the Director and Prospect Researcher, will have full access to the software platform. Development Officers and Leadership will rely on RENXT integration to access the formatted data.

5. How do you envision integrating the AI-generated prospect scores into your existing fundraising workflows? For example, will they be used for prospect prioritization, donor segmentation, personalized outreach strategies, or other operational processes?

   ➥ The prospect software platform will need to seamlessly integrate with RENXT to ensure smooth data synchronization and accessibility for all relevant stakeholders. Integration key data points into RENXT include but not mandatory: wealth indicators (such as net worth, real estate holdings, income, and stock holdings), philanthropic history (including past donations and charitable interests), donor ratings and scores (such as wealth, philanthropic, and affinity scores), business and professional information (such as employer details and board memberships), personal affiliations, political contributions, and real-time updates alerts, allowing for a comprehensive view of prospects and more effective engagement strategies.

6. The RFP mentions using Troy University data to build the models. Could you please specify the types of constituent data available (e.g., historical giving records, engagement metrics, demographic information, wealth screening results, alumni status) and the formats in which this data currently exists (structured databases, CSV exports, unstructured documents, etc.)? This information will help us design appropriate data ingestion and processing pipelines.

   ➥ RENXT constituent data include: constituent demographics (e.g., contact information, employment details, and family information), giving history, event attendance, TROY education history.

7. What is the timespan of historical data available for model training? Understanding the longitudinal depth of your dataset will inform our approach to developing predictive algorithms with appropriate temporal context.

   ➥ The historical data available in RENXT goes as far back as early 1900s with Education information and Giving History.

8. Approximately how many constituent records would be included in the initial dataset for model development? This volume estimate will help us properly dimension the solution architecture and processing requirements.

   ➥ 150,000 plus records

9. Has Troy University conducted any assessment of data quality within your constituent records? If so, could you share insights regarding completeness, consistency, or known data quality challenges that might impact model development?

   ➥ Data Enrichment is completed multiple times throughout the year.

10. Are there specific constituent attributes, behaviors, or engagement signals that Troy University believes are particularly indicative of donor potential? Understanding these priorities will help us design models that align with your institutional knowledge and experience.

    ➥ Top predictive factors that indicate donor potential include giving history (including donation amounts, frequency, and gift designations), engagement behaviors (such as event participation, preferred contact method), education affiliations (college, sports, etc.), donor trends (like consistent giving or upgrades), and demographic information (such as age, family background, and geographic location), wealth indicators (such as net worth, income, real estate holdings, and business ownership), and philanthropic affinities (like board memberships and past charitable interests).

11. Following the initial model build, what are your expectations for ongoing data updates? Please specify the anticipated frequency (real-time, hourly, daily, weekly, etc.), volume of incremental data, and your preferred transfer mechanisms (SFTP, API integration, database connections, etc.).

    ➥ Real-time updates are expected with database connections.

12. When assessing 'donor viability' and 'likelihood of giving,' are there specific donor segments or giving programs that represent priority areas for Troy University (e.g., major gift prospects, annual fund participants, planned giving, first-time donors)?

    ➥ All donor segmenting is a priority for TROY, ranging from major gift prospects to planned giving and annual leadership donors.

13. Beyond the basic likelihood scoring functionality, what additional AI-generated insights would deliver the most value to your Development team? For example, would you benefit from personalized next-action recommendations, wealth capacity indicators, program affinity predictions, peer donor comparisons, or other analytics?

    ➥ The most value would be gained by adding personalized next-action recommendations, capacity indicators to identify which prospects to contact in the next 12 months, and a clear capacity range to guide strategic outreach efforts.

14. To what extent does your team require transparency into the AI's decision-making process? Is it critical for users to understand the specific factors influencing each prospect's score (explainable AI), or is your primary focus on prediction accuracy and performance outcomes?

    ➥ It is important to understand the influencing factors as well as having focus on the output.

15. Please describe your current donor pipeline segmentation methodology and how you envision the AI scoring system enhancing or transforming this approach. Understanding your existing segmentation framework will help us develop models that complement and elevate your established practices.

    ➥ It is important to understand the influencing factors while maintaining a strong focus on the output to ensure that strategic decisions are informed and aligned with desired outcomes.

16. What is your preferred format for the AI-generated donor propensity scores? Would your team benefit most from numerical probabilities (e.g., 0-1.0 scale), categorical classifications (e.g., High/Medium/Low potential), or both? If categorical, should these classifications be derived from predefined thresholds or dynamically generated by the AI system?

    ➥ Numerical probability would be sufficient as part of the scoring format.

17. Are there specific reporting or dashboarding needs related to the AI-driven segmentation that are critical for the University? This includes not only the presentation of insights but also any key features, metrics, or trends the University would want to track and visualize within these dashboards.

    ➥ For better insights, we would like to include on the dashboard key information like top donor segments, wealth and giving capacity, engagement stats, predictive analytics, donor demographics, gift history, retention rates, matching gift opportunities, real-time alerts, and customizable filters to help make smarter, data-driven decisions.

18. What is your desired frequency for refreshing constituent scores and insights? E.g., near real-time updates, scheduled refreshes (hourly, daily, weekly, monthly) or event-triggered recalculations.

    ➥ Near real-time updates for constituent scores are desired.

19. The RFP references 'regular calls to discuss model performance.' Could you elaborate on which performance aspects are most critical for your team to review during these sessions? For instance, are you primarily interested in discussing prediction accuracy metrics, understanding key donor indicators, translating insights into actionable fundraising strategies, or addressing model refinement opportunities? This clarification will help us structure our ongoing support to focus on your highest-priority outcomes.

    ➥ The scheduled calls would assist with model performance review, assess the accuracy of the AI-driven segmentation and scoring, and receive guidance on how to effectively use the AI-driven insights to prioritize prospects, approach donors, and tailor communications for maximizing giving.

20. What is your preferred cadence and format for the collaborative performance review sessions mentioned in the RFP? Please specify your desired frequency (weekly, bi-weekly, monthly), and whether you envision these as formal reviews, interactive working sessions, or a combination of approaches.

    ➥ A combination of interactive and formal review is envisioned for the performance review, quarterly or semi-annually.

21. Please clarify your expectations for the 'ongoing feedback and support' mentioned in the RFP. Specifically, what types of support services are most important to your team (e.g., technical troubleshooting, model performance analysis, feature enhancements, user training refreshers, strategic consultation)?

    ➥ The post-implementation support, it is important to include ongoing technical assistance, customized training, and regular performance reviews to ensure optimal use, the ability to refine strategies for donor engagement, and stay updated with new features and enhancements.

22. What are your expectations regarding the frequency of model retraining or updates? Are you anticipating a regular schedule (monthly, quarterly), performance-based approach (triggered by accuracy degradation or data drift), or event-driven updates (following significant campaigns or institutional changes)?

    ➥ Semi-annual updates and retraining would be beneficial in ensuring the models stay relevant and effective leading up to the potential of a capital campaign and/or other fundraising efforts.

23. Does Troy University have a preference for hosting the Donor Prospect Research Platform within your own cloud environment versus a vendor-hosted solution? A university-hosted approach would offer advantages such as enhanced data sovereignty, potential integration with existing security frameworks, and direct alignment with your institutional IT policies.

    ➥ There is not a particular preference with the hosting.

24. Beyond the exchange of data (e.g., pushing scores or pulling constituent information), what is the desired nature of the integration with Blackbaud RE NXT? Are you seeking a deeply embedded integration where AI insights appear natively within the RE NXT interface, or would a separate platform with data synchronization capabilities meet your requirements?

    ➥ The two systems can be connected through integration but remain separate. The integration helps ensure streamlined workflows, and Development Officers can view key donor data within RENXT that is provided from the research platform.

25. What are the specific data points or functionalities within Blackbaud RE NXT that are most critical for integration with the Donor Prospect Research Platform? (e.g., pulling constituent data, pushing scores/insights, updating prospect stages, etc.)

    ➥ Integration key data points into RENXT include but not mandatory: wealth indicators (such as net worth, real estate holdings, income, and stock holdings), philanthropic history (including past donations and charitable interests), donor ratings and scores (such as wealth, philanthropic, and affinity scores), business and professional information (such as employer details and board memberships), personal affiliations, political contributions, and real-time updates alerts.

26. Has Troy University implemented any custom fields, records, or specialized configurations within RE NXT that would be relevant to this integration? Additionally, do you currently utilize any of Blackbaud's API services or integration frameworks that could be leveraged for this project?

    ➥ We do not currently utilize any of Blackbaud's API services that would be leveraged for this.

27. Could you provide additional context about your current implementation of Blackbaud RE NXT, including how extensively it's used within your development operations, any customizations you've implemented, and any existing third-party integrations?

    ➥ RENXT is our main alumni and donor database that is extensively utilized by Development and Alumni Engagement staff members.

28. Could you please specify your current version of Blackbaud RE NXT and any significant modules or add-ons you utilize? Additionally, are there any planned upgrades or changes to your Blackbaud environment that might coincide with this project's implementation timeline?

    ➥ We are Blackbaud RENXT Hosted while also accessing the Raiser's Edge Database view.

29. If the platform has its own user interface, what are the most critical UI/UX features or design principles Troy University would prioritize? (e.g., intuitive dashboards, clear presentation of AI scores and donor segmentation, effective visualization tools for AI insights and summary analytics, customizable reporting, ease of navigation, mobile accessibility, etc.)

    ➥ To fully leverage the capabilities, clear presentation, detailed profiles, and customized filters are needed to display real-time alerts, AI-powered donor scoring to enable more targeted outreach and personalized engagement efforts

30. What is your preferred method for data synchronization between the platforms (e.g., real-time, batch, API-driven)?

    ➥ Real-time updates are expected with database connections.

31. Beyond Blackbaud RE NXT, are there other institutional systems that should be considered for potential integration with the Donor Prospect Research Platform, either initially or in future phases? This might include financial systems, student information databases, alumni engagement platforms, or marketing automation tools.

    ➥ Blackbaud RENXT will be the only system.

32. Are there any technical restrictions, policy limitations, or security protocols that would affect the export of constituent data from your Blackbaud environment for use in AI model development? For example, are there constraints on export volumes, frequency, specific data fields, or required anonymization processes?

    ➥ There are no restrictions or limitations, provided there is a mutual agreement between the companies ensuring that data remains confidential and is not shared or disclosed without prior consent.

33. Are there any specific requirements regarding where your data must be physically hosted (e.g., within the United States, within Alabama)?

    ➥ Yes, United States

34. What are Troy University's expectations regarding system resilience and recovery capabilities for the Donor Prospect Research Platform? Specifically, could you define your desired Recovery Time Objective (RTO) and Recovery Point Objective (RPO) requirements in the event of a service disruption or disaster scenario? These parameters will help us design appropriate redundancy, backup, and recovery mechanisms that meet your institutional continuity standards.

    ➥ Troy University expects reasonable business continuity practices to be in place for the Donor Prospect Research Platform. While we do not have highly complex requirements for this service, we expect the following:

    - Recovery Time Objective (RTO): 24 hours
    - Recovery Point Objective (RPO): 24 hours

    These values reflect our expectation that the system can be restored and data recovered within one business day in the event of a disruption. We expect the vendor to maintain appropriate backups, redundancy, and recovery procedures to support this level of resilience.

35. What are your expectations for response times and resolution times for different severity levels of support issues (e.g., critical, high, medium, low)?

    ➥ Response times will be determined by the severity of the issue.

36. What are Troy University's preferred channels and processes for submitting and tracking support requests? For example, do you prefer a dedicated ticketing system, direct email communication, phone support, or a combination of methods?

    ➥ Any form of channel is ok.

37. To ensure mutual understanding of performance expectations, could Troy University outline the key performance indicators (KPIs) or service level agreement (SLA) breaches that would be considered a 'failure of faithful performance' and potentially trigger a claim on the performance bond?

    ➥ Troy University considers a 'failure of faithful performance' to include repeated or unresolved violations of agreed-upon service levels or KPIs. Examples that could trigger a claim on the performance bond include:

    - Failure to meet critical project milestones or delivery deadlines without approved justification
    - Extended or repeated system outages beyond the agreed RTO
    - Failure to protect sensitive data, resulting in a data breach or compliance violation
    - Ongoing failure to respond to support or issue resolution requests within the agreed SLA timeframes

38. What is Troy University's expected long-term duration for ongoing technical support and maintenance for this platform?

    ➥ Support and maintenance would be covered for the duration of the contract.

39. Beyond the HECVAT assessment mentioned in the RFP, does Troy University maintain additional security protocols, review processes, or internal security assessments that vendors must satisfy?
    ➥ 40 - TROY expects vendors to comply with our local security requirements located at https://www.troy.edu/epolicy/800-technology.html

40. Are any third-party security certifications or attestations, or security frameworks are required (e.g., SOC 2, FISMA, NIST 800-53, ISO 27001, FedRAMP)?

    ➥ 41 - TROY requires NIST 800-53 compliance

41. Given the complexity of the integration requirements with Blackbaud RE NXT and the comprehensive nature of the AI/ML solution requested, would Troy University consider extending the proposal submission deadline beyond August 6, 2025? An extension would allow vendors to fully incorporate any clarifications issued on July 29th into their proposals and provide sufficient time for the preparation and physical delivery of the required hard copies. The current timeline leaves only 8 days between receiving answers to questions and finalizing, printing, and shipping the complete proposal packages, which may present logistical challenges, particularly for vendors located outside Alabama.

    ➥ Deadline August 13, a week from the original August 6 deadline.

42. The RFP indicates an 8-week model build and delivery process. Could Troy University share the specific drivers behind this timeline requirement?

    ➥ 8 weeks is adequate time for model build and delivery as a good balance, allowing enough time for thorough data integration, enrichment, and custom model training while still being fast enough to support a timely fundraising strategy without long delays.

43. Would the university consider an extended implementation schedule (beyond 8 weeks) if it would allow for more comprehensive solution development, thorough integration testing with Blackbaud RE NXT, and a more robust validation process?

    ➥ A 2-week extension to equal 10 weeks is permissible.

44. The RFP references both Bid Bond and Performance Bond requirements. Could Troy University clarify whether these are distinct obligations with different purposes and thresholds, or if they represent the same requirement referenced in different sections? Additionally, would the University consider a request to waive or modify these bond requirements as part of a bidder's proposed deviations, particularly for vendors with demonstrated performance history in higher education?

    ➥ At this time, it is the policy of Troy University, in compliance with Alabama Procurement Policies, to require both Bid Bonds & Performance Bonds. The description and terms of both of these bonds can be found on the Bid Checklist included in the solicitation package. If a vendor wishes to discuss a formal waiver of either bond, they may contact

the Director of Procurement for Troy University.

45. Could Troy University confirm the extent of bidder liability in the event that parties are unable to reach agreement on final contract terms following selection? Specifically, if good-faith negotiations on the definitive agreement do not result in mutually acceptable terms, would the selected contractor be excused from performance obligations without penalty, or are there specific parameters around this scenario that bidders should be aware of when preparing their responses?

    ➥ Terms are to be largely outlined and agreed upon prior to selection and awarding of the contract. In the event that the selected vendor cannot deliver upon the agreed terms, or it is deemed in the best interests of TROY to terminate the contract, the awarded contractor will receive their performance bond back, and TROY will determine the level of need for the service/goods and whether to issue a new RFP.

END OF ADDENDUM NO.1