VCU Procurement Services

CONTRACT EXTENSION

DATE:	**5/15/2023**
CONTRACT TITLE:	**CRM Customization and Configuration**
CONTRACT NO:	**8067797BA (C0000585)**
NEW START DATE:	**10/01/2023**
NEW END DATE:	**9/30/2024**
CONTRACTOR:	**Zuri Group LLC**

PRICING:

Select one of the options below.

- ☑ Pricing remains the same as the previous contract period.
- ☐ Attached is the revised pricing in accordance with the contract terms.

PAYMENT METHOD:

VCU is migrating away from processing payments via paper check as much as possible. If you have not already done so, we strongly encourage the use of our electronic payment options.

For more information about costs and **to sign up**, please visit Vendor Invoicing and Payment.

CERTIFICATE OF INSURANCE:

☑ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing Virginia Commonwealth University as the "Additional Insured", citing the contractor's name and contract number, emailed to sbkessinger@vcu.edu or mailed to Virginia Commonwealth University Risk Management, P.O. Box 843040, Richmond, VA.

All other terms and conditions of 8067797BA shall remain unchanged and in full force and effect.

RESPONSE:

Zuri Group LLC
Name of Firm

John Murphy
Signature

John Murphy
Name Printed

Founder/CEO
Title

5/16/2023
Date

VCU Procurement Services

July 11, 2022

Zuri Group, LLC
Andrew Urban
328 NW Bond St STE 204
Bend, OR 97701
Andrew@zurigroup.com

RE: Contract #: 8067797BA-02
Renewal No.: 4 of 4

To Whom It May Concern:

Zuri Group, LLC's contract with Virginia Commonwealth University (VCU) for Blackbaud CRM Customization and Configuration expires on 9/30/2022 VCU intends to exercise the renewal of this contract in accordance with the terms of contract #: 8067797BA-02.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

OPTIONAL USE CONTRACT:
This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Services shall be provided in accordance with the contract for the renewal period: 10/1/2022 through 9/30/2023.

_x_ Pricing remains the same as the previous contract period.
___ Attached is the revised pricing in accordance with the contract terms.
_x_ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA.

Please return this document to me as soon as possible. Your response may be emailed to me at baugustine@vcu.edu

Sincerely,

Brandon C. Augustine
Brandon C. Augustine
Category Manager

RESPONSE:

Zuri Group, LLC

Name of Firm

DocuSigned by:

John Murphy

15E866B4B37044F...

Signature

John Murphy

Name Printed

Founder/CEO

Title

7/12/2022

Date

FIRST AMENDMENT TO CONTRACT NO. 8067797BA-02 (C0000585)
BY AND BETWEEN
VIRGINIA COMMONWEALTH UNIVERSITY
AND
ZURI GROUP LLC

This First Amendment to Contract No. 8067797BA-02 by and between Virginia Commonwealth University, hereinafter referred to as “VCU”, and Zuri Group LLC, hereinafter referred to as “Contractor”, is entered into as of the date the last signature is affixed below.

WHEREAS, VCU and Contractor entered into Contract No. 8067797BA-02, dated September 27, 2018 (“the Contract”). This Contract was renewed twice, each for one (1) year with a current expiration date of September 30, 2021; and

WHEREAS, VCU desires to continue to obtain the goods and services that Contractor offers as revised herein; and

WHEREAS, Contractor agrees to continue to provide the goods and services to VCU as revised herein; and

WHEREAS, VCU and Contractor desire to revise the Contract in accordance with Section XXII, Paragraph O, Changes to the Contract.

NOW THEREFORE, VCU and Contractor agree to enter into this Amendment to allow the following changes and additions to the Contract:

1. The Parties agree to exercise their third right to renew this Contract for a one-year period beginning October 1, 2021 and ending September 30, 2022.

2. In addition to existing services, Contractor shall perform certain hosting migration services, including assisting VCU with its migration from its current Blackbaud CRM server to a VCU on-premises hosting server, as more fulling described in the Scope of Work, attached and incorporated herein.

3. Effective at the beginning of this third Renewal, VCU agrees the Zuri Group rate has changed from $175 per hour to $225 per hour.

4. Notwithstanding any other term of the Contract, Virginia Commonwealth University Health System Authority (“VCUHS”) is a third party beneficiary to the Contract and Contractor hereby grants to VCUHS all the same rights and remedies available to VCU under the Contract. Accordingly, VCUHS may pursue relief from Contractor through a direct claim (at law or in equity) or indemnification in the same manner as VCU with respect to all damages, claims, losses, penalties, costs, breaches of confidentiality (including HIPAA), and other harm incurred by VCUHS and caused by Contractor’s acts or omissions, interface with the VCUHS electronic health record, or access to VCUHS data.

5. The parties acknowledge that Contractor is a Business Associate of both VCU and VCUHS as memorialized in the Business Associate Agreement attached and incorporated herein.

6. Contractor shall comply with VCUHS's security requirements, including but not limited to the policies and procedures available in the VCU Health System Risk Assessment portal available at https://grc.vcuhealth.org/policy, all of which are hereby incorporated by reference. Contractor shall comply with VCUHS's reasonable requests for information to permit VCUHS to perform an IT security risk assessment. Contractor covenants that the responses it provides shall not materially change unless agreed upon by VCUHS in writing.

7. Except as modified herein, all other provisions of the Contract, including all other Appendices and terms and conditions set forth in the Contract, shall continue and remain in full force and effect. The Contract shall have precedence over all other documents incorporated herein.

IN WITNESS WHEREOF, the parties have caused this Amendment to be duly executed, intending thereby to be legally bound.

Virginia Commonwealth University	**Zuri Group LLC**
By:______________________	By: John Murphy
Printed Name: John McHugh	Printed Name: John Murphy
Title: Director, Procurement Services	Title: President, CEO
Date:______________________	Date: 9/16/2021

BUSINESS ASSOCIATE AGREEMENT
BY AND BETWEEN
VIRGINIA COMMONWEALTH UNIVERSITY, VIRGINIA COMMONWEALTH UNIVERSITY HEALTH SYSTEM AUTHORITY, OFFICE OF DEVELOPMENT AND ALUMNI RELATIONS
(COVERED ENTITIES)
AND ZURI GROUP LLC (BUSINESS ASSOCIATE)

1. This Business Associate Agreement ("BAA") is entered into by and between Virginia Commonwealth University Health System Authority, on behalf of itself and its Affiliates and Virginia Commonwealth University and Advancement Services (collectively and individually a "Covered Entity") and Zuri Group LLC. ("Business Associate") and is effective as of the effective date of the Amendment to Contract 8067797BA-02 (C0000585) to which this BAA is attached.

2. Covered Entity wishes to disclose certain information, some of which may be Protected Health Information ("PHI") to Business Associate pursuant to the terms of a separate agreement referenced above ("Primary Agreement") and any subsequent amendments, whereby Business Associate provides services to or performs functions on behalf of Covered Entity.

3. Covered Entity and Business Associate acknowledge that this relationship is governed by the Health Insurance Portability and Accountability Act of 1996, Public Law 104-191 ("HIPAA") and regulations promulgated thereunder (45 CFR Parts 160-164) by the US Department of Health and Human Services (the "Privacy and Security Rules"), Title XIII, Subtitle D the Health Information Technology for Economic and Clinical Health Act provisions of the American Recovery & Reinvestment Act of 2009, 42 USC §§ 17921-17954 ("HITECH"), and other applicable laws (together referred to herein as "Privacy and Security Law"). All terms used in this BAA shall have the same meanings as set forth in the HIPAA Rules.

4. <u>Responsibilities of Covered Entity</u>: The Covered Entity shall:

   a. Provide Business Associate with a copy of its Notice of Privacy Practices and notice of any changes thereafter.

   b. Notify Business Associate of any restriction on the Use and Disclosure of PHI that Covered Entity has agreed to, or is required to abide by, under HIPAA to the extent that such restriction may affect Business Associate's use or disclosure of PHI.

   c. Notify Business Associate of any changes in, or revocation of, the permission granted by individuals to Use or Disclose their PHI, to the extent that such changes may affect the Business Associate's Uses or Disclosures of PHI.

5. <u>Permitted Uses and Disclosures by Business Associate</u>: Business Associate may: (i) use or

disclose PHI only as necessary to perform services or functions on behalf of Covered Entity pursuant to the Primary Agreement; (ii) use PHI for the Business Associate's proper management and administration of business associate or to carry out the legal responsibilities of the Business Associate; (iii) disclose PHI for proper management and administration of Business Associate, provided that disclosures are required by law or Business Associate obtains reasonable assurances from the person to whom the information is disclosed that (a) the PHI will remain confidential, (b) the PHI will be used or further disclosed only as required by law or for the purpose for which it was disclosed to the person, and (c) the person will notify Business Associate of any instances of which it is aware or reasonably should be aware in which the confidentiality of the information has been breached; and (iv) use PHI to provide Data Aggregation services relating to the health care operations of the Covered Entity, if provided for under the Primary Agreement.

6. Responsibilities of Business Associate: The Business Associate shall:

a. Not use and/or disclose PHI other than as permitted or required by this BAA or as otherwise required by law.

b. Not use or disclose PHI in any manner that would constitute a violation of the HIPAA Rule if such use or disclosure had been undertaken by Covered Entity.

c. To the extent the Business Associate is to carry out one or more of Covered Entity's obligations under Subpart E of 45 CFR Part 164 of the Privacy Rule, Business Associate will comply with the requirements of Subpart E that apply to Covered Entity in the performance of such obligations.

d. Use appropriate safeguards to maintain the security of PHI and prevent any use or disclosure of PHI not specifically permitted under this BAA.

e. Request from Covered Entity and disclose to its agents and subcontractors, or other third parties, only the minimum PHI necessary to perform a specific function required or permitted hereunder.

f. Ensure that Business Associate's agents or subcontractors, that create, receive, maintain or transmit PHI on behalf of the Business Associate agrees to the same restrictions, conditions, and requirements that apply to the Business Associate with respect to the PHI in accordance with 45 CFR 164.502(e)(1)(ii), 164.504(e)(2)(ii)(D) and 164.308(b)(2).

g. Make available to Covered Entity any PHI contained in a Designated Record Set as necessary to satisfy its obligations under 45 CFR 164.524 to provide access to Individuals.

h. Make available to Covered Entity any PHI contained in a Designated Record Set as necessary for amendment and incorporate any amendments into PHI maintained by Business Associate or its agents or subcontractors, as required by 45 CFR 164.526.

i. Maintain and make available information required to provide an accounting of disclosures of PHI to the Covered Entity as necessary to satisfy its obligations under 45 CFR 164.528.

j. To the extent this Section 6 requires Business Associate to make information and/or materials available to Covered Entity, Business Associate agrees to make such information and/or materials available as soon as possible following request by Covered Entity, but, unless otherwise specified herein, in no event later than ten (10) business days after such request.

k. Make its internal practices, books, and records or electronic copies of materials relating to the Use and Disclosure of PHI received from, or created, received, maintained or transmitted by Business Associate or its agents or subcontractors on behalf of Covered Entity, available to DHHS, or its designee, and available to Covered Entity and its representatives (including, without limitation, attorneys, affiliates, accountants, consultants, bankers and financial advisors) for purposes of determining compliance with the HIPAA Rules.

l. Not, directly or indirectly, receive remuneration in exchange for disclosing PHI received from or on behalf of Covered Entity except as permitted by HITECH Act § 13405 and any implementing regulations that may be promulgated or revised from time to time.

m. Comply with all further legal requirements affecting Use and Disclosure of PHI, including, without limitation, any applicable requirements of the HIPAA Rule establishing procedures for mitigating, to the greatest extent practicable, any adverse effects from any improper Use or Disclosure of PHI.

n. Notify Covered Entity's Privacy Officer of any Breach of Unsecured PHI, as required by law, in writing. With the exception of law enforcement delays that satisfy the requirements under 45 CFR 164.412, or as otherwise required by applicable state law, the written report will be provided within ten (10) business days from the date the Business Associate knew, or reasonably should have known by exercising due diligence of such Breach. The written report shall include, to the extent possible:

    i. Identification of each individual whose PHI has been breached.
    ii. A description of what happened, including the date of the acquisition, access, use or disclosure and the date of the incident becoming aware to Business Associate;
    iii. The types of unsecured PHI involved in the acquisition, access, use or disclosure;

iv. Any steps an individual should take to protect themselves from the acquisition, access, use or disclosure; and
v. What Business Associate is doing to investigate the acquisition, access, use or disclosure, to mitigate harm to individuals and to protect against any further unpermitted acquisition, access, use or disclosure of unsecured PHI.

o. Business Associate acknowledges and agrees to reimburse Covered Entity for any and all reasonable costs it incurs in providing notification as required by 45 C.F.R. 164.404. Such costs shall be subject to approval by Business Associate, whose approval shall not be unreasonably withheld, conditioned, or delayed.

p. Security Rule: Use appropriate administrative, physical and technical safeguards and comply with Subpart C of 45 CFR Part 164 with respect to electronic protected health information, to prevent use or disclosure of PHI other than as provided for by this BAA in order to protect the confidentiality, integrity and availability of the PHI it creates, receives, maintains, or transmits on behalf of Covered Entity. Report to Covered Entity any Security Incident of which Business Associate becomes aware. However, Business Associate shall not be required to report pings and other broadcast attacks on Business Associate's firewall, port scans, unsuccessful log-on attempts, denial of service attacks, and any combination of the above, so long as no such incident results in the defeat or circumvention of any security control, or in the unauthorized access, use or disclosure of PHI.

q. Electronic Transactions. If Business Associate, on behalf of the Covered Entity, engages in any of the electronic transactions listed in HIPAA at 42 U.S.C. § 1320d-2(a)(2), or utilizes a third-party to engage in such transactions on behalf of Covered Entity, Business Associate warrants that it and any third-party acting on its behalf will fully comply with the requirements of the Standards for Electronic Transactions ("Transactions Standards") promulgated by HHS, as set forth in 42 CFR Part 162. Failure of either Business Associate or third parties engaged in covered electronic transactions to comply with the Transactions Standards, shall be considered a material breach of this BAA and shall be grounds for immediate termination of this BAA and the Primary Agreement pursuant to Section 7 of this BAA.

7. Terms and Termination

a. Term. This BAA shall become effective on the Effective Date and shall continue in effect until terminated as provided in this Section 7. Termination of this BAA shall automatically terminate the Primary Agreement between the Parties unless otherwise agreed to in writing by the Covered Entity at the time of termination of this BAA.

b. Material Breach. A Breach by Business Associate of any material provision of this BAA, as reasonably determined by Covered Entity, shall constitute a material breach and shall be grounds for termination of the BAA by Covered Entity if the Business Associate does not cure such breach within thirty (30) days of written notice by the Covered Entity. To the extent such breach is not curable, in the sole discretion of the Covered Entity, the Covered Entity may terminate this BAA immediately.

c. Reasonable Steps to Cure. If Covered Entity knows of a pattern of activity or practice of Business Associate that constitutes a material breach or violation of Business Associate's obligations under the Privacy and Security Law or the provisions of this BAA, Covered Entity may, in its sole discretion (and without limiting any other rights Covered Entity may have under law or equity): (i) terminate the BAA; or (ii) require Business Associate to take reasonable steps to cure such breach or end such violation, as applicable, within thirty (30) days of written notice from the Covered Entity. If Business Associate's efforts to cure such breach or end such violation are unsuccessful, Covered Entity shall terminate this BAA, and the Primary Agreement(s) for services, if feasible.

d. Effect of Termination. Upon termination, non-renewal, or expiration of this BAA for any reason, Business Associate shall destroy or return to Covered Entity all PHI that Business Associate received from Covered Entity, or otherwise created, received, maintained or transmitted by Business Associate on behalf of Covered Entity in any form, and shall retain no copies of such PHI. In the event that Business Associate determines that returning or destroying the Protected Health Information is infeasible, Business Associate shall provide to Covered Entity, written notification of the conditions that make return or destruction infeasible within ten (10) business days and Business Associate shall: (i) retain all or such portion of PHI, in compliance with the obligations set forth in this BAA and required by law; (ii) limit further use or disclosure of such PHI to those purposes that make the return or destruction of such PHI infeasible; (iii) Business Associate's duties contained herein shall survive the non-renewal, termination, or expiration of this BAA. If Business Associate elects to destroy the PHI, Business Associate shall certify in writing to Covered Entity that such PHI has been destroyed.

8. Miscellaneous

a. Remedies. The Parties acknowledge and agree that violation of this BAA by Business Associate would cause irreparable harm to Covered Entity and that Covered Entity's damages would be difficult to ascertain. Accordingly, in addition to any other remedies available, Covered Entity shall be entitled to seek injunctive relief and/or specific performance to enforce the provisions of this BAA.

b. Litigation. If Covered Entity is named as a party to any action or suit involving Business Associate's Use or Disclosure of Covered Entity's PHI or a Security Breach of Covered Entity's PHI, Business Associate shall reasonably cooperate with Covered Entity in defense of such matter. In addition, if Business Associate receives a subpoena or other request for disclosure of PHI or other information provided by Covered Entity or related to this BAA, Business Associate shall promptly, but in no case later than three (3) days of receipt, notify Covered Entity. Business Associate shall, prior to disclosure, provide Covered Entity a reasonable opportunity to seek a protective order with respect to any such request or subpoena and Business Associate shall furnish only that portion of PHI that is required to be disclosed by law.

c. Amendments. This BAA may not be modified, nor shall any provision hereof be waived or amended, except in a writing duly signed by an authorized representative of both Parties. In the event: (i) an amendment or modification to the Privacy and Security Law or other laws or regulations applicable to the Use or Disclosure of PHI; or (ii) an interpretation by a court or governmental agency invalidates or is otherwise inconsistent with the terms of this BAA, the Parties shall take such action as is reasonably necessary to implement the standards and requirements of the Privacy and Security Law, other laws or regulations applicable to the Use or Disclosure of PHI, or any applicable court or governmental agency interpretation. If, after a period of thirty (30) days following one Parties' notice to the other invoking this Section, the Parties have not agreed upon amendment(s) sufficient to resolve the inconsistency, either Party may terminate this BAA promptly upon written notice to the other.

d. No Third Party Beneficiaries. Except as expressly provided for herein, the provisions set forth in this BAA are for the sole benefit of the Parties hereto and their successors and permitted assigns, and they shall not be construed as conferring any rights on any other persons or entities.

e. Notices. Any notices to be given hereunder to a Party shall be in writing and shall be deemed given if delivered personally, forwarded via U.S. Mail (certified with return receipt requested) or by recognized national overnight courier express carrier to such Party's address given below:

If to Covered Entity:

VIRGINIA COMMONWEALTH UNIVERSITY	VIRGINIA COMMONWEALTH UNIVERSITY HEALTH SYSTEM AUTHORITY
ATTN: Director of Procurement Services Box 980327 Richmond, VA 23298	ATTN: Chief Compliance & Privacy Officer Box 980471 Richmond, VA 23298
Physical Address: 912 West Grace Street, 5th Floor Richmond, Virginia 23284	 830 E. Main Street, Suite 1802 Richmond, Virginia 23219

Office of Development and Alumni Relations
ATTN: Rob Downs

Physical Address:
111 N. Fourth Street
Box 842039
Richmond, VA 23219-2201

If to Business Associate:
Zuri Group LLC
328 Nw Bond Street
200
Bend, Oregon 97703

Each Party to this BAA may change its address listed above for notice by providing the other advance written notice thereof in the manner provided herein.

f. Counterparts; Facsimiles. This BAA may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute one original Agreement. Facsimile copies hereof shall be deemed to be originals.

g. Survival. The respective rights and obligations of Business Associate and Covered Entity shall survive termination, non-renewal, or expiration of this BAA.

h. Waiver. The failure or delay of either Party to enforce or pursue any right or remedy existing pursuant to this BAA shall not be deemed a waiver of such right or remedy and shall not limit such Party's ability to pursue or enforce such right or remedy or any future right or remedy.

i. Severability. If any clause or provision herein shall be judged invalid or unenforceable by a court of competent jurisdiction or by operation of any applicable law, the validity of any other clause or provision shall not be affected and the remainder of this BAA between the Parties shall remain in full force and effect. Each of the provisions shall be enforceable independent of any other provision and independent of any other claim or cause of action.

j. Interpretation. Any ambiguity in this Agreement shall be interpreted to permit compliance with the HIPAA Rules. In the event of any conflict or inconsistency between this BAA and the terms of a Primary Agreement (s), the terms of this BAA shall govern.

k. Affiliates. For purposes of this BAA, "Affiliates" shall mean those organizations controlling, controlled by, or under common control with Covered Entity.

l. Indemnification. Business Associate shall defend, indemnify, and hold harmless Covered Entity and its respective employees, officers, directors, trustees, and agents ("Indemnitees") from and against any and all losses, costs, penalties, fines, demands, liabilities, legal actions, judgements, and expense of every kind (including reasonable attorney's fees, including at trial and on appeal) asserted or imposed against any Indemnitees arising out of the acts or omissions of Business Associate's officers, directors, trustees, or employees related to the performance or nonperformance of this BAA.

IN WITNESS WHEREOF, each of the undersigned Parties have caused this BAA to be duly executed in their respective names and on their behalf by their respective authorized representatives effective as of the date first set forth above.

VIRGINIA COMMONWEALTH UNIVERSITY HEALTH SYSTEM AUTHORITY	**BUSINESS ASSOCIATE Zuri Group**
Name (print): James Siegel	Name (print): John Murphy
Title: Interim CFO	Title: CEO, President
Signature: ______________________	Signature: John Murphy
Date: ______________________	Date: 9/16/2021

VIRGINIA COMMONWEALTH UNIVERSITY

Name (print): John McHugh

Title: Director of Procurement Services

Signature: ______________________

Date: ______________________

Office of Development and Alumni Relations

Name (print): __Robert Downs_____________

Title: __Director of DAR Information Systems__

Signature: ______________________

Date: ______________________

VCU Procurement Services

September 2, 2020

Zuri Group, LLC
Kate Nimety
328 NW Bond St STE 204
Bend, OR 97701
kate@zurigroup.com

RE: Contract #: 8067797BA-02
Renewal No.: 2 of 4

To Whom It May Concern:

Zuri Group, LLC's contract with Virginia Commonwealth University (VCU) for Blackbaud CRM Customization and Configuration expires on 9/30/2020 VCU intends to exercise the renewal of this contract in accordance with the terms of contract #: 8067797BA-02.

Your signature constitutes your firm's acceptance of this renewal, to include the optional use language and the eVA registration requirement provisions below.

OPTIONAL USE CONTRACT:
This contract is an optional use, requirements based contract. VCU is in no way required to make purchases from the Contractor and may, in its sole discretion, purchase the identical and/or similar goods/services from other sources. Services shall be provided in accordance with the contract for the renewal period: 10/1/2020 through 9/30/2021.

_✓_ Pricing remains the same as the previous contract period.
____ Attached is the revised pricing in accordance with the contract terms.
____ By signing and submitting this contract renewal letter Contractor certifies that it will maintain the insurance coverages required at the time the contract was awarded. At renewal, Contractor shall have a new Certificate of Insurance listing VCU as the "Additional Insured", citing the contractor's name and contract number, mailed to VCU Risk Management, P.O. Box 843040, Richmond, VA.

Please return this document to me as soon as possible. Your response may be emailed to me at baugustine@vcu.edu

Sincerely,

Brandon C. Augustine
Brandon C. Augustine
Category Manager

RESPONSE:

Zuri Group, LLC

Name of Firm

John Murphy

Signature

John Murphy

Name Printed

President, CEO

Title

9/8/2020

Date

Contract #: 8067797BA-02

Procurement Services

COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract Number: 8067797BA-02

This contract entered into date by Zuri Group, LLC, hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Commonwealth University, called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

PERIOD OF THE PERFORMANCE: From October 1, 2018 through September 30, 2019 with the option to renew for four (4) additional one (1) year terms upon mutual written agreement of both parties.

SCOPE OF CONTRACT: The Contractor shall provide the goods to the Purchasing Agency as set forth in the Contract Documents.

The contract documents shall consist of:

(1) This signed form
(2) Contract Appendix A
(3) The Request for Proposal (RFP) # 8067797BA, dated June 11, 2018
(4) The Contractor's Proposal dated June 15, 2018

All documents are incorporated herein by reference. Any conflict or inconsistency between the incorporated documents shall be resolved by giving precedence in the following order:

(1) This signed form
(2) Contract Appendix A
(3) The Request for Proposal (RFP) # 8067797BA, dated June 11, 2018
(4) The Contractor's Proposal dated June 15, 2018

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

Zuri Group, LLC

By: John Murphy   Name Printed: John Murphy

Date: 9/20/2018   Title: President, CEO

PURCHASING AGENCY:

Virginia Commonwealth University

By: Karol Kain Gray   Name Printed: Karol Kain Gray

Date: 9-27-18   Title: VP for Finance and Budget

VCU Procurement Services

APPENDIX A
CONTRACT #: 8067797BA-02

NEGOTIATED CLARIFICATIONS, MODIFICATIONS, AND ADDITIONS TO CONTRACT

Purchasing Agency and Contractor agree as follows:

Contractor's proposed pricing shall be modified to read as follows:

Hourly Rate:

- Blended Hourly Rate: $175/ hour*

* Any reimbursement for travel, meals, or lodging, etc., shall only be reimbursed upon submittal of receipts and in accordance with VCU travel rules and allowable cost policies.

SSO Customization offers 3 pricing options:

- Option #1 - $11,000 Annual Subscription (includes annual Support and Maintenance)
- Option #2 - $22,000 perpetual license + $4,000 annual Support and Maintenance
- Option #3 - At any point VCU can apply any subscription payments to a perpetual license.
- Zuri Group shall offer the same pricing options of its Data Warehouse Replication Utility.

Constituent Update Customization:

- $14,000 Fixed Price

Zuri Group will extend pricing to all VASCUPP Zones defined in the map.

VIRGINIA COMMONWEALTH UNIVERSITY

REQUEST FOR PROPOSALS (RFP)

Blackbaud CRM Customization and Configuration

8067797BA

OFFER FORM

In compliance with this request for proposals and to all conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the services described herein in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation. Furthermore, the undersigned agrees not to start any work relative to this particular solicitation until a resulting formal signed Purchase Order is received by the Contractor from University Purchasing. Any work relative to this solicitation performed by the Contractor prior to receiving a formal signed Purchase Order shall be at the Contractor's own risk and shall not be subject to reimbursement by the University. **Signature below constitutes acknowledgement of all information contained through links referenced herein.**

A. GENERAL INFORMATION:

Name & Address of Firm:

Zuri Group LLC.	Date: 6/15/2018
328 NW Bond St STE 204	By *(Signature In Ink)*:
Bend, OR Zip Code 97701	Name Typed: Mark Terrero
E-Mail Address: mark@zurigroup.com	Title: VP Client Engagement
Telephone: (843) 224-3379 **Toll free, if available**	Fax Number: (800) 878-3084 **Toll free, if available**
DUNS NO.: 96-239-6946	FEI/FIN NO.: 93-1313272

B. SMALL, MINORITY & WOMAN OWNED BUSINESS INFORMATION

MINORITY-OWNED BUSINESS:	( ) YES	(x) NO	WOMEN-OWNED:	( ) YES	(x) NO
REGISTERED WITH eVA:	( ) YES	(x) NO	SMALL BUSINESS:	(x) YES	( ) NO
VIRGINIA DSBSD CERTIFIED:	( ) YES	(x) NO	VIRGINIA DSBSD CERTIFICATION#:		

C. PROPRIETARY OR CONFIDENTIAL INFORMATION

	Check the box to the left "if" your proposal contains proprietary or confidential information. If so, ***add an attachment sheet to this form with details.***	**See Paragraph X for more information**

D. ACKNOWLEDGEMENT OF ADDENDA: Acknowledge your receipt of any addenda that may have been issued under this solicitation. **See Paragraph VIII for more information**

Addendum #		Addendum #	
Addendum Date	__/__/__	Addendum Date	__/__/__
Addendum #		Addendum #	
Addendum Date	__/__/__	Addendum Date	__/__/__

Affix this Form as the FIRST PAGE of your proposal.

ZURI GROUP

7/8/2018

VCU
Procurement Services – Proposal Processing
912 W. Grace Street, 5th Floor
Richmond, VA 23284

Dear VCU Team:

We are delighted to have the opportunity to respond to your Request for Proposal. Based on the introductory call to all suppliers, Zuri Group is confident that it can meet and exceed all expectations for the projects discussed and any others that could arise in the future at VCU.

Zuri is a small, agile and customer focused company that has a significant practice with Blackbaud CRM clients. We have worked in partnership with approximately 50% of the Blackbaud CRM client base providing functional and technical consulting, training and strategic services. Our team, comprised of primarily ex Blackbaud resources, has cumulative experience with Blackbaud CRM and Advancement Operations that easily surpasses 150 years. Our distinguishing factor is our ability to deliver cost effectively and include our clients in the learning process to create long term self-sufficiency. There is no project too small, large or complex for our team at Zuri.

We look forward to having the opportunity to work with VCU and support its vision for the future.

Regards,

Mark Terrero
VP Client Engagement

PARTICIPATION BY SMALL BUSINESSES, BUSINESSES OWNED BY WOMEN

BUSINESSES OWNED BY MINORITIES

This appendix should only be completed by firms that are not Virginia Department of Small Business and Supplier Diversity (DSBSD) certified small businesses.

Offeror certifies that it will involve Small Businesses, Women-Owned Businesses, and/or Minority-Owned Businesses (SWaM) in the performance of this contract either as part of a joint venture, as a partnership, as Subcontractors or as suppliers.

VCU has an overall goal of 42% SWaM participation for all annual purchases and seeks the maximum level of participation possible from all its contractors.

SWaM Subcontracting Plan: *In the space below, please describe the areas in which you plan to utilize SWaM-certified businesses as subcontractors. Please be specific as to what types of goods and/or services these subcontractors will provide during the performance of the contract. If currently known, please list the exact SWaM-certified subcontractors you plan to utilize.*

Zuri Group LLC is a small business comprised of a diverse employee group. We do not intend to sub-contract to any resources outside our team.

In the event a project arises outside of skill level, we will seek to collaborate with a contrator than meets SWAM suppliers.

Commitment for utilization of DSBSD SWaM Businesses:

0 % of total contract amount that will be performed by DSBSD certified SWaM businesses.

Identify the individual responsible for submitting SWaM reporting information to VCU:

Name Printed: Mark Terrero

Email: mark@Zurigroup.com

Phone: 843-224-3379

Firm: Zuri Group LLC

Offeror understands and acknowledges that the subcontracting plan above represents a contractual commitment by the Offeror. Failure to achieve the percentage commitment will be considered a breach of contract and may result in contract default.

Acknowledged:

By (Signature):

Name Printed: MARK Terrero

Title: VP Client Engagement

Payment Methods

1. **Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later.

It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid.

Failure to accept the commercial card after award of contract will be considered a contract compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card.

Questions regarding this method of payment should be sent to commcard@vcu.edu.

2. **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: http://treasury.vcu.edu/banking/vendor-ach/.

Contractor must indicate the method of payment selected:

______ Commercial Card Payment (Wells Fargo VISA)

X Automated Clearing House (ACH)

Invoicing and Payment Method Acknowledgement:

Signature: [signature]
Name Printed: MARK A TERRERO
Title: VP Client Engagement
Name of Firm: Zuri Group LLC
Date: 6/15/18

Please identify the following contact information for the individual who will serve as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:

Name of the individual: Howard Horowitz

Title: ~~COO~~

Mailing address: 328 NW Main St, Bend OR 97701

Email address: HowARD@ZuriGroup.Com

Phone number: 862-432-9559

Fax number: 800-878-3084

APPENDIX III

EXCEPTIONS

Any and all exceptions to the terms, conditions or specifications of this RFP must be clearly stated, section by section, in the space provided below. Exceptions should be numbered to coincide with the RFP numbering and be provided in the sequence in which the item appears in the RFP. If more space is required, please copy this page or attach separate sheets. Please note VCU, at its discretion, reserves the right to consider proposals containing significant exceptions to be non-responsive.

UNIVERSITY PROPOSAL SECTION NUMBER	STATED EXCEPTION
N/A	N/A

COMPANY QUALIFICATIONS

VCU

June 8, 2018

ZURI GROUP

7/8/2018

VCU
Procurement Services – Proposal Processing
912 W. Grace Street, 5th Floor
Richmond, VA 23284

Dear VCU Team:

We are delighted to have the opportunity to respond to your Request for Proposal. Based on the introductory call to all suppliers, Zuri Group is confident that it can meet and exceed all expectations for the projects discussed and any others that could arise in the future at VCU.

Zuri is a small, agile and customer focused company that has a significant practice with Blackbaud CRM clients. We have worked in partnership with approximately 50% of the Blackbaud CRM client base providing functional and technical consulting, training and strategic services. Our team, comprised of primarily ex Blackbaud resources, has cumulative experience with Blackbaud CRM and Advancement Operations that easily surpasses 150 years. Our distinguishing factor is our ability to deliver cost effectively and include our clients in the learning process to create long term self-sufficiency. There is no project too small, large or complex for our team at Zuri.

We look forward to having the opportunity to work with VCU and support its vision for the future.

Regards,

Mark A Terrero

Mark Terrero
VP Client Engagement

Qualifications of the Firm

Zuri has operated in the Non-Profit sector for 11 years. The company founders, John Murphy and Howard Horowtiz were originally employed by Kintera – a company acquired by Blackbaud to support its P2P Fundraising presence and growth. Zuri sought to offer its customers a more personalized customer experience and, as a result, it has grown consistently each year since its founding. Zuri Group has primary three areas in which it serves its clients – Digital and P2P, CRM (focused on Blackbaud CRM, Raiser's Edge and Salesforce) and Strategic Services (Advancement Operations and Strategy). Zuri employs a team of 55 resources with approximately half supporting technical and functional consulting on the Blackbaud CRM platform. Zuri is deemed to be a virtual company with the clear majority of employees working remotely. Company Administrative Offices are located in Bend, Oregon. The employees that would serve to support projects at VCU are based in Charleston, Denver, Orlando and Bend. Depending on the nature of the project, other resources may be employed to support the best outcome for the project.

The spectrum of Zuri Group's Blackbaud CRM work encompasses data conversion, customizations, systems integration, advanced configuration, reporting and system design/implementation. We have deep expertise with BBIS, BBDM, the Blackbaud Data Warehouse and its BI functions.

Zuri Group is currently engaged with Boston College to support its full implementation of the Blackbaud CRM platform. While relatively early in the project life cycle, one early notable project outcome was a 100% accuracy on the Millennium to Blackbaud CRM revenue transfer on TR 1 of the Data Conversion. Our Data Conversion resources can readily develop scripts to identify and correct anomalies in the data conversion process or in existing systems.

Zuri Group has enhanced the user experience through thoughtful deployment of customizations at a number of institutions. One example is our SSO solution that was developed in conjunction with Ohio State University and is now in use a several more Blackbaud CRM client institutions. Another customization we have developed, assisted Yale University with its integration of data from its on-line engagement platform, iModules to Blackbaud CRM. Another client wanted to add additional dimensions to its Blackbaud CRM Data Warehouse to support reporting of data from

ticketing solutions and finance in conjunction with its Advancement Data. Zuri also collaborated with Wake Forest to create a customization of its BBIS Alumni Directory functionality. The interface provides a superior user interface for alumni community members and has increased participation and adoption.

https://wakenetwork.wfu.edu

Zuri will often seek to utilize Advanced Configuration options in Blackbaud CRM before considering a customization approach. An example of an Advanced Configuration/Customization option is attached in our response. Essentially, it's a configuration that was built to support a large organization with multiple users and provide checks and balances before new or changed data is committed to the database. VCU referenced a desire to provide an enhanced workflow related to Acknowledgement Processing and Management. We believe that represents, in large part, leveraging Advanced Configuration of Blackbaud CRM.

In terms of reporting, Zuri Group has done extensive work with both U of Central Florida and Concordia. In both cases, Zuri Group developed campaign and engagement reports using SSRS. Zuri has recently received certification with Tableau and has done development using Power BI for University of Alabama.

Zuri Higher Education Clients

Higher Education

- **American University**
- **Boston College**
- **Clemson University Foundation**
- **Concordia University**

- **Davidson College**
- **Georgia Tech Foundation**
- **Regis College**
- **Rice University**
- **Santa Clara University**
- **The Ohio State University**
- **UCF Foundation**
- **UConn**
- **University of Alabama**
- **University of Chicago**
- **University of Guelph**
- **University of London**
- **University of Rochester**
- **West Point**
- **Yale**

Of the VASCUPP Member Institutions, we have done business with VMI:

- **2017, $5,100**
- **2016, $18,400**
- **2015, $5,700**

Zuri Custom Catalogue

Title	Detailed Description

Update Contact Record Type Global Change	**Customization Details • The customization will create a custom global change • The global change will take 3 parameters: o Contact type - required, a dropdown of address, email, phone o Selection – required, based on Contact type selected, a search list for either address selections or email selections or phone selections o Type to update to – required, dropdown of all address types (if Contact type = address), dropdown of email types (if Contact type = email), dropdown of phone types (if Contact type = phone) • The global change will update the type (phone type/address type/email type) on all the records in the selection to the 'Type to update to' in the parameter.**
CRM Attachment Management	**Memorial Sloan-Kettering Cancer Center (MSKCC) is utilizing the constituent documentation tab in Blackbaud CRM to reference constituent documents which live on a file share. These links are stored as media links. Blackbaud CRM does not launch media links which reference files due to security issues, so MSKCC needs Blackbaud CRM modified to download the file attachments rather than requiring users to edit the media link, copy the path, and place it in their windows "run" box. MSKCC also needs a process to verify the media links point to valid files, similar to the Blackbaud YODA validation process.**
Batch Splitting	**Memorial Sloan-Kettering Cancer Center (MSKCC) processes large amounts of constituents and revenue using batch in Blackbaud CRM. Batches with high row counts can be**

	unwieldy so MSKCC has requested a mechanism to split batches into smaller chunks. Zuri Group will develop a customization to meet this need.
Constituency Flags	**Memorial Sloan-Kettering Cancer Center (MSKCC) processes many constituent updates through the constituent update batch in Blackbaud CRM, and needs an easy way to flag people with specific constituencies prior to committing changes to their records. Zuri Group will develop a small customization to meet this need.** **The customization allows constituencies to be associated with constituent update batch templates. Once one or more constituency is associated with a template, any instance of that batch will have a "Flag constituents" action available. Pressing the "Flag constituents" button will add a row note to any constituent in the batch with a constituency matching the choices associated with the template**
Constituent Update Batch Reference Field	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs a custom field called Batch reference in Constituent Update Batch. The field is needed for file imports into Constituent Update Batch but must not commit to anywhere on the constituent record. 'Batch reference' field will just be used to pass information from the import file to the batch user.**

Custom Name Formats	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM's name format system to better match MSKCC's existing rules for addressing constituents.** **Zuri will create the following custom formulas:** **1. Formal Addressee Middle Name** **2. Formal Addressee Middle Initial** **3. Formal Salutation** **4. Informal Addressee** **5. Informal Salutation**
Deceasing, Constituent Merges and Tribute Merges	**Memorial Sloan-Kettering Cancer Center (MSKCC) is implementing Blackbaud CRM and has found gaps in the functionality relating to deceasing, constituent merges and tribute merging** **MSKCC marks constituents deceased in two ways: Constituent Update Batch and through the "Mark Deceased" task on the constituent's personal tab. In either case, the following logic should apply.** **• Any group or committee roles and memberships should be end-dated with the deceased date, unless the constituent is the primary** **• If a household member is deceased, the household will be inactivated or dissolved based on settings in a new configuration screen detailed below. No end dates will be applied to household membership.**
Do Not Email Reason Codes	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM's existing tracking of email opt-outs. This includes tracking a reason code when an opt-out is recorded as well as configuring the**

	Luminate Online to Blackbaud CRM sync to populate this reason code.
ERB Contact Information Extension	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM's enhanced revenue batch to include address, email and phone fields which will add new contact information to constituents.**
Funding Interest Changes	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes make changes to the Funding Interest Section of a Prospect view.** **• Site will be removed from the OOB data list.** **• There has already been a customization to add three new fields to the Extended Properties of a designation. These new fields are Division, Interest Category and Interest Type. MSKCC would like a process to link those new designation fields to the Funding Interest found on a prospect record.** **• The new fields will display on the OOB data list and column headers will be named Division, Interest category and Interest type.** **• Add Funding Interest Form will be modified to allow new fields.** **• Edit Funding Interest Form will be modified to allow new fields.** **• A new Data list will be created to display revenue that is grouped by Division, Funding Interest and Funding Category found on the designation. This data list will have a parent and child list. The parent will display revenue summarized by Designation, Division, Interest category and Interest type. The child list will display the detailed list of revenue used in the summary total.** **• Prospect Funding Interest Query views will be updated to include**

	Division, Interest Category and Interest Type. **• There will be 3 global changes added to BBCRM.** **o Global change definition to add funding type, level of interest, Division, Interest category and Interest type to a prospect record.** **o Global change definition to delete Funding Interest from prospect records.** **Fonts and Capitalization standards will be used in all data lists:** **• Nodes are book capitalization.** **• Fields are first letter cap only.** **• Extended Properties:** **o Interest category** **o Interest type**
Global Change to Format International Address	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs format constituent international addresses per USPS's new requirements for mailing to foreign addresses. Zuri Group will develop a global change that processes all constituents or a selection of constituents and updates their foreign address if there to USPS's standard which requires all address lines to be in upper case.**
Household Constituencies and Solicit Codes	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM to keep selected constituencies and solicit codes consistent across household**

	members. Zuri group will build a configuration area to select the constituencies and solicit codes, as well as a global change which will sync the selected data between household members.
Info Source Global Changes	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to add a Global Process to Blackbaud CRM's existing Global Change processes to add Information Sources on Constituent Records. This project will also require the creation of 3 new query views. These will be cloned from the Constituent Query View. All new query views will have OOB query operators which will include Contains, Does not Contain and Sounds like. The query views are; • Address • Email • Phone The Global change listed in this document will be found under Administration>Data>Global Changes. The Global changes listed here will have the same processes for Process global change, Reset last run on date, Edit, Delete and Assign Permissions.**
Interaction Extensions	**Memorial Sloan-Kettering Cancer Center (MSKCC) requires easier ways to bulk update prospect plan interactions and also requires strict naming conventions to be enforced on prospect plan names. Zuri group will develop the Blackbaud CRM customizations outlined in this document to address these needs.**
Life Changing Events and Appeal Searches	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM to allow donor recognition credit to be easily reassigned after life changing events,**

	as well as enhance the appeal search functionality.
NCOA and Deceasing Management	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs a custom process to better manage the review of NCOA and deceasing processes.**
Post to GL Reconciliation	**MSK requires custom reconciliation output functionality in CRM for posted revenue that will ultimately be stored in SmartStream. The Finance team requires the ability to view summarized transaction data (transaction types, amounts, etc), from a specific post file, and subsequently drill down to view the detailed line item transactions where applicable. A custom datalist will be made available via the Post to GL 'History' and 'Recent Status' tabs on the 'Post to GL list' page, for reconciliation purposes. The datalist will display summarized transactions in the same summarized groupings as the CRM Post to GL output file, but will have ability to drill down to detailed transactions for each summarized line item. Detail transactions will have data necessary to look up transactions by Post id.**
Recognition Credit Global Change	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs a custom process to ensure recognition credits between spouses meet organizational rules.**
Revenue Split Global Change	**Memorial Sloan-Kettering Cancer Center (MSKCC) has gifts/revenue in CRM coming from Luminate Online that are assigned to a designation/fund which is kind of a holding tank. Once the correct fund/designation that the gift needs to be assigned to is available, the transaction/gift has to be split up**

	because not 100% of it is reallocated. Cost of fundraising has to be kept in the initial fund/designation/holding tank. So the revenue needs to be split/adjusted between the holding tank and the new designation/fund. The new designation/fund is determined from an LO Survey question's answer which will be brought over and stored in the revenue/gift record's documentation via the existing LO Sync process.
Selection Management	**Memorial Sloan-Kettering Cancer Center (MSKCC) wishes to enhance Blackbaud CRM's ad hoc query and selection functionality to make it easier to aggregate multiple selections to be used for exclusions. MSKCC also has two related data export needs that will be met by customizations outlined in this document** **MSKCC needs an easy way to add multiple selections together into one selection. The one selection can then be used in many different places for marketing exclusions and other purposes**
Deposit Date Trigger	**The customization allows user to choose to keep Deposit Date (revenue attribute) on revenue records in sync with Transaction Date in newly entered revenue records via including a custom extension field in Enhanced Revenue Batch (ERB) template. User can even choose to switch on/off 'Apply deposit date trigger' for specific rows in the batch.** **'Apply deposit date trigger' is a Boolean field in Enhanced Revenue Batch (ERB) extension which when switched on applies the Deposit date update logic based on Transaction date.**

Global Change for Concierge floor patient	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs to bring in a constituent or patient data point or field from their DMP database to CRM and store it in CRM in a constituent attribute. Zuri Group will develop a global change that processes all constituents or a selection of constituents and updates those constituents' 'Concierge floor patient' attribute in CRM with data from MSK's DMP database.**
Reconciliation Functional Area	**Memorial Sloan-Kettering Cancer Center (MSKCC) needs to put together revenue reconciliation information (lists/reports) in one place in a Reconciliation Tab/Area. They need to reconcile posted revenue data by lockbox and payment method each month and make sure amounts, numbers and totals match. Zuri Group will develop custom reconciliation data lists and view forms and put together a custom Reconciliation tab in Batch Entry page wherein all reconciliation information (existing custom reports and lists and new ones created by Zuri) will be put in a single place.**
Transaction Integration between iModules and CRM	**Yale migrated its online donation forms to iModules and requires a daily synchronization of transactions from iModules to CRM. The integration involves several business processes, staging tables, and a user interface within the CRM that manages the pull of transactions from iModules into CRM and puts the transactions into an enhanced revenue batch for users to review before committing. The business processes include: 1) identifying the controls (forms) and columns (fields) that are in iModules (meta-data), 2) pulling down the**

	transactions from iModules and also the column data that is also captured on the form (joint info, tribute info, matching gift, etc.), 3) pushing the transactions into a simple or complex enhanced revenue batch. **The user interface displays all controls, columns, transactions, and processes of the integration. The transactions are held in staging tables that allow for troubleshooting or research when the ERB is evaluated. Also the processes have exception tracking that helps with troubleshooting errors that may occur.**
Profile Update History in CRM	**There is need to view data as it exists on the profile update forms for the end user and to compare that with what TCU staff see. To accomplish this a new data list was created to view current statuses of profile updates and whether they've been processed through batch, are waiting in batch, waiting to be downloaded, overwritten by the user or orphaned. A report would allow that specific data to be viewed. Additionally, a query view was created that allows TCU staff to monitor the current status of all profile update transactions.**
Profile Update for Greek Involvement and Student Government	**The profile update functionality in BBIS related to educational involvement was updated to incorporate "Greek involvement" and "Student government" options. This introduced new functionality to handle managing groups as available educational involvement options for alumni users. Functionality was added to automate adding constituents as members of groups when they've added the educational involvement online and to allow easy visibility of**

	that involvement from the existing educational involvement view.
Contact Us Form Creation	**Due to the limitations of the form builder built in to BBIS a custom part is created to handle "Contact us" functionality.**
Form builder	**1. The form builder tool is a custom part in BBIS. Many instances of that custom part can be created and customized based on user and intent.** **2. The form builder tool uses submitted data to modify constituent data in BCRM. Instead, submissions are recorded in the system as XML to allow complete control of fields and options.** **3. Submissions are emailed to a user-defined list of recipients.** **4. The tool allows the selection of the multiple field types all having multiple configuration options.** **5. A standard "Address block" field type are added with Country, Address, City, State and Zip fields.** **6. An email field type is added that automatically checks for valid email address. An option to confirm email address is available.** **7. A phone number field type is added that automatically checks for valid phone numbers (numbers and hyphens only).** **8. A description text field type is added that allows for HTML text.**

	9. A generic single line and multi-line text field type is added. Max length is changeable. **10. Multiple choice drop-down list and checkbox list is added. Number of options and values of options is customizable.** **11. Single choice drop-down list, checkbox list and radio option list is added. Number of options and values of options is customizable.** **12. Drop-down list, checkbox list and radio option lists have ability to allow 'other' option with textbox for value.** **13. The tool allows for files to be uploaded by the user. Files uploaded are stored in BBIS and links to those files are included in email notifications.** **14. Fields can be moved up and down in order when designing the form.** **15. Field labels allow HTML text.** **16. Form submission display either a success page with customizable text and a summary of data submitted or a user defined BBIS page to be redirected to.** **17. A management area is added to BCRM to view form information including number of form submissions, last date submitted, last date form was updated, URL to form and page name and site the form is on.**

Online giving enhancements	**1. Created a donation form management area within BCRM to handle donation form friendly URLs, suggested giving levels, designations, page intros and sidebar content configurations that are currently being handled on the donation form page itself.** **2. Added new section to the BBIS section of the TCU functional area labeled "Online giving configuration" with tasks to manage donation form configurations, intros and sidebars.** **3. Added data lists for viewing donation form configurations as well as intros and sidebars.** **4. Allowed the user to add and edit donation forms.** **5. A donation form has an editable title, description, friendly URL, donation form page, available giving levels, designations, page intro, sidebar, start date and end date.** **6. Available giving levels are sortable and have customizable labels.** **7. An option to allow an 'other' giving level is available.** **8. Designations are sortable and have customizable labels.** **9. An option to allow an 'other' designation is available. Text entered in this field will come in as an 'Other designation' attribute. The designation of the donation will be the default designation.** **10. Default designation configuration is added to the new management area**

	within BCRM. **11. Page intros and side bars are useable on multiple donation form pages without having to recreate them.** **12. Images uploaded from your computer and images previously uploaded to the BBIS image library are available to use.** **13. Both a page intro and sidebar has a title, description and body HTML.** **14. An instance of the advanced donation form is accessible from the friendly URL chosen and display the selected giving levels (and the desired label, if any), designations, page intro and sidebar content.** **15. When the URL contains direct market effort segment source code information in the URL, populate a hidden field on the form with the source code.** **16. When the URL contains designation information select from the available designations the provided designation (if it exists, otherwise leave it blank).** **17. When the URL contains amount information select from the the available amount values the provided amount (if it exists, otherwise leave it blank).**
Add Appeal Search to Planned Gift Add as Revenue Form	**The objective of this solution is to add an appeal search field to the Add planned gift as revenue form.**

Naming Opportunity Customizations	**The objective of this solution is to match the fields in the Naming Opportunity Inventory add and edit forms to the fields in the COH OppNet Database. Because naming opportunities can be edited at the prospect opportunity level, a new security role will be created to protect data. To allow for reporting, the new fields will be added to query and export definition.**
Year over Year or Annual Event field	**The objective of this solution is to provide an easy way to connect recurring events for reporting and trend analysis.**
Group Member Roles	**The objective of this solution is to provide users with a way to add and edit group memberships from the group member's own constituent record.**
Planned Gift Commitment and Planned Gift Payment GL Transaction Mapping Customization	**Customization to the Transaction Mapping functionality within General ledger Setup in AccessHope for planned gift commitments and for payments against planned gift commitments.**
GL Transaction Mapping Placeholder Value 11111 Replacement	**Customization to the Transaction Mapping functionality within the General Ledger Setup in AccessHope.**
Constituent Search Custom Deceased flag	**Provides a flag in a column in the "Constituent Search by Name or Lookup ID" search results datalist that indicates if the constituent is deceased with "Yes"**
Recognition Credit History Datalist	**Update of the Recognition History datalist to add a column in the output to show for recognition credit donations that displays what constituency the donor is. Only specific types of constituencies will show.**

Add Date Field to the Correspondence Process	**Add a Date sent to the Manage Correspondence Process. The current process writes a date sent as part of the correspondence detail. That current date sent is the date the process runs and is not indicative of the actual date mailed/emailed.**
Revenue Transaction Deposit Date (This was not delivered to client)	**Customization of revenue records and several associated objects to store and surface a Deposit Date field.** **Client did not go forward with this customization**
Email opt-out details	**New fields added to the constituent email record to provide additional details from Luminate online.**
Revenue Category Cross Reference	**Allows the ability to map a revenue category to all gifts received in Luminate Online. Including TeamRaiser revenue, calendar event revenue, registration payments, and regular donations from donations forms.**
TR Discount Codes Global Change	**The custom global change will read the sync history and retrieve discount codes from he Luminate Online API for any new or changed registrations since the last time it ran. The discount will be used to create a Registration Balance Adjust Request.**
Calendar Events modification	**Group ticket tiers so that tiers are shown together in the order table, and the group is given a title. Show descriptions. Allows people to register as an organization, and pay as an organization.**
Custom Uncommitted Batches List Builder	**Customize the Uncommitted batches list builder to include columns for projected total, actual total and comments**

Correction Request Form Changes Functional Specifications	**Update of the current custom form used to request changes to revenue records**
Manage Correspondence Responses in Bulk	**Provides a way to bulk update responses for a specific correspondence code on a selection of constituents who have received mail or email. The solution has been designed primarily for use with planned giving mailings, but can be used for any outbound communication tracked with a correspondence code.**
Fundraising Manager Prospect list 683	**This solution will require replacing the current Fundraising Manager Prospect List data list with a list built with List Builder and adding two new columns one for First Name and one for Last name. The native processes loaded with list builder will allow sorting and management of visible columns.**
996 Changes to Fundraiser Pending Activity and Prospects and Plans Lists	**This solution will require replacing the current Pending Activity list with a list created with list builder. This solution will also require replacing the current Prospects and Plans data lists found under the Prospects and Plans tab with a list created with list builder.**
1001 Opportunities and Asks	**This solution will require modifications to all the opportunity data lists that can be navigated to from the Opportunity Summary page. The modifications will include replacing the data lists with list builder lists and adding Primary Plan manager name and Expected Ask Date and designation public name. The process for managing columns is out of the box functionality for List builder.**

	A new custom date field will be created to retain Expected response date.
Security changes to the BBIS alumni directory Priority 7	**Security added to the alumni pages so only constituents that have been committed to BCRM can access the alumni pages**
Configurable Enhanced Revenue Batch Size Limitation	**Allows the ERB functionality to allow batch templates used with LO sync to be configured with a limit on the number of revenue transactions per batch.**
Constituent Batch Review	**Allows a manual review of constituents which meet certain criteria when coming from Luminate Online. A constituent update batch extension is customized to meet this need.**
Add Custom Fields to Interactions and Plan Steps	**To facilitate the request to facilitate the correspondence process, 6 custom fields will need to be created. The data will be visible on a new data form on the pending steps list builder, overdue step/interaction form, and all of the add and edit forms for interactions and prospect steps. The fields will be available in the query and export definition.**
Global Change to add Revenue Category to Event Registration Payments	**Event records are modified to allow a Revenue Category to be added. A global change is created to find the Revenue Category on each event and apply that category to those registration payments associated with that event.**
Constituent Notification of Corporate Compliance Opt Out	**Adds notification test to the header of the constituent management page for**

	those constituents who have the Corporate Compliance Opt Out solicit code.
Management of Planned Gift Revenue Commitment Balances	**Enables a user to zero out the calculated balance on a planned gift revenue commitment by executing a task which will surface on the planned gift revenue page when appropriate conditions are met.**
Fundraiser Flag in Interaction Owner Search	**When adding an interaction to be assigned to a fundraiser, add an indicator to the returned results list where if the constituent has the Fundraiser constituency, and the date to on the constituency is blank, the indicator will be visible.**
Constituent Information Update	**Customization of the add/edit forms for address, email, phone, and various bio fields that will not be immediate but will create a batch where the changes/additions requested are held until the records team can process the changes.**
Global Change for Industry Group Membership	**This customization automates the process of adding members and the start and end dates for those members to industry groups from industry group events.**
Opportunity Records Customization	**Customization of the view, add, and edit forms, query and export views, of the Opportunity records to allow for more information to be tracked such as Expected gift date, Likelihood to ask.**
Constituent Batch Notification	**Customization of constituent batches to contain an email option, email is automatically sent to the "creator" of the batch (not the current owner), with a link to a data-list containing the newly created constituents records first name, last name (or org name), and the constituent lookup ID. This**

	will be used for review of newly added constituents.
Last Adjustment Date Field	**Customization surfaces the most recent adjustment date in the summary view of a revenue transaction record.**
Management of Event Registration Balances	**This customization provides a mechanism for managing noncollectable outstanding balances for Event registrations. Allows the user to adjusted the original amount owed, making the outstanding balance $0. A request form is created to allow review and approve or deny actions.**
Post to GL Customization	**Customization of a process in CRM to create a posting file for consumption by it's general ledger system, PeopleSoft ERP. Once G account distributions have been generated for revenue transactions, the custom post process will produce a .csv file formatted for PS containing separate columns for the ten chart accounts fields that make up an account in PS. The custom post process will parse the strings out and insert the segment values into the correct chart field columns in the PS post file.**
Registration Contact Tab - Roles	**This customization adds a classification of Roles for Registrant Contacts (an existing customization). They use there roles to properly communicate with registrants pre and post event. On the existing Registrant Contacts Tab on the Event Registrant page, adding the ability to add roles.**

Wake Forest Customized Alumni Directory	**WFU Development and Alumni teams saw an opportunity to enlist alumni to assist with the development effort and sought a solution to help facilitate this program.** **WFU has developed, with Zuri Group's help, a customized Alumni Directory using BBIS and BBCRM. WFU felt they could build on the Alumni Directory and create a customized Volunteer Module where alumni volunteers can search on classmates and other constituents in the Wake Forest Community (in their CRM) and request fundraising assignments for those prospects to assist with fundraising campaigns. Once prospects are assigned to alumni volunteers, the Volunteer Module (via BBIS) will allow volunteers to access contact and gift/pledge information from the CRM and to also record volunteer interactions with prospects. The volunteer can also update prospect information that updates information in the CRM. WFU staff can manage volunteers, assignments and prospects with an interface in the CRM.**

Notify Fundraiser Manager of Prospect Assignment Listbuilder	**This listbuilder shows prospects assigned to fundraisers who directly report to the user viewing the list of his/her now Fundraiser tab. This direct reporting relationship is configured in the Organization Hierarchy in CRM**

Qualifications of the Staff

Brandon Ferris, Senior Director of Strategic Services

Brandon will support Usama and will coordinate the work of Zuri Group technologists (Rod Razavi; see below). Brandon's background makes him particularly effective. His expertise and experience balances technology with advancement, with an emphasis in:

- System Implementation
- Data Management Strategies
- Performance Management
- Business Process Design
- Reporting Solutions
- Database Management

Brandon's recent work serving clients has included:

- Performing Blackbaud system consulting and training, custom reports training, predictive modeling/data-driven fundraising consulting, project management, business process design/re-engineering/documentation, and fundraising strategy consulting.
- Leading enterprise client implementations of industry-leading fundraising CRM software through all phases, including project planning and management, business process design, system and process documentation, data conversion validation, business process testing, end user training, output development, and deployment.
- 12 years front-line advancement experience in annual giving, planned giving, major giving, marketing/communications, and advancement leadership in educational institutions.

Rod Razavi, Director of Integrations and Conversions

Rod will serve Sample HE through his technical expertise in converting organizations to Raiser's Edge. He will partner with the team to ensure that Zuri Group understands and can offer recommendations about Raiser's Edge, NetCommunity, customizations, and all supplemental applications and university-wide systems supplying data into the advancement environment. His broad skill set is particularly deep in the following areas:

- Fundraising Systems
- customizations
- Conversion
- ETL Processes
- Solution Integrations
- Service Oriented Architecture

Rod's work has recently included client-facing engagements where he has:

- Converted more than 150 organizations, including Yale University, University of California San Diego and others, to new advancement systems.
- Created custom data exchange and integration solutions for universities to help them combine web-based data sources with transactional databases of record.
- Developed best-in-class proprietary conversion tools.

Ken Swift, President of CRM Practice

Before joining the Zuri Group, Ken was responsible for leading the Solution Architecture team within Blackbaud's Professional Service organization, specializing in Blackbaud CRM and The Raiser's Edge. Ken has been involved in dozens of Blackbaud CRM implementations and focused primarily on the technical aspects of the engagements; including customizations, integrations, reporting and business intelligence. Throughout his tenure at Blackbaud, Ken was the point person for the vast majority of Blackbaud CRM technical pursuits and was a critical person in helping translate client requirements, estimating, scoping, and staffing implementations.

Karen Collins, Vice President Client Success

Karen helps clients gain a holistic view of excellence in all engagements. She collaborates with senior leadership teams to develop and execute strategic plans to align technology investments and IT services with the expectations of end users as well as national offices and regional organizations. Karen has deep knowledge in analyzing needs and issues, defining approach, and leading teams in delivering value-driven solutions that strengthen the effectiveness of campaigns and operations. Karen is a certified Project Management Professional by the Project Management Institute, the leading experts in best practices and industry standards.

Karen has a proven track record in bringing a sense of organization, quality and formalized process to complex, multi-tiered projects and she understands the various communication requirements necessary to get projects completed on time, on budget and most importantly – on quality. She focuses on quality management by adopting key initiatives that ensure high success in process organization, financial administration, change management and risk mitigation. In addition, Karen has the strategic ability to analyze current business processes and provide tangible solutions for improvement. Big Brothers Big Sisters of America, Make-A-Wish of America, City of Hope and Boston College are a few organizations who have benefited from Karen's expertise at Zuri Group.

Karen also oversees the Client Success team at Zuri Group which offers exemplary leadership to all clients through assigned client managers, high touch project management, and post project launch support.

Brian Harris

Brian Harris joins Zuri Group with over 15 years of experience with Blackbaud software and methodology. He specializes in custom reporting and development. His work at Blackbaud covered a large variety of areas, from senior support specialist for Raiser's Edge, Education Edge and BBCRM, to business intelligence development, SQL reporting and technical consultation for Blackbaud Data Warehouse.

Chris Whisenhunt

With over 10 years of experience in the IT field, 8 years being in technical consulting and over 8 years development with Blackbaud's Infinity SDK, Chris is well versed in meeting the needs of clients in the nonprofit sector. In 2010, Chris began working remotely for Blackbaud, managing multiple projects while adhering to contractually based timelines. After leaving Blackbaud he went to work for Santa Clara University as their technical architect and subject matter expert for Blackbaud CRM and BBIS. He is one of the leading technical experts in the Blackbaud community forums, which speaks to his sense of communication and shared knowledge.

A full list of staff can be found here: https://zurigroup.com/team/

References

Hadar Call/Michael Felberbaum

Yale University

Director, Alumni Affairs and Development ITS

Email: Hadar.call@yale.edu

Type of Work: CRM 2.91 to 4.0 upgrade, rewrote dozens of reports, customization development, testing, training and Business Process Improvement

Kevin Nunnally

University of Alabama

AVP Advancement Services

Email: knunnally@advance.ua.edu

Phone: (205) 348-8108

Type of Work: CRM consulting, customization development, BBIS advanced/standard donation forms, Data conversion

Travis Soyer

Texas Christian University

Phone: (817) 257-5037

Email: t.soyer@tcu.edu

Type of Work: SDK Trainings, BBIS development, end-user training, CRM selection, Custom output development

ZURI GROUP

Pricing Options

Zuri Group Blended Hourly Rate - $185/hr

The hourly rate does not include travel related expenses for on-site work. Given our current understanding of the projects at hand, we believe the vast majority of the work effort can be accomplished via on-line meetings and interactions. In the event that a specific project requires travel, expenses tend to be 12-15% of the overall project estimate.

Fixed Price Projects – Zuri Group if entirely open to working on specific projects on a fixed price basis.

SSO Customization offers 3 pricing options:

Option #1 – $12,000 Annual Subscription (includes annual Support and Maintenance)

Option #2 - $24,000 Perpetual license + $4, 000 annual Support and Maintenance

Option #3 – At any point VCU can apply any subscription payments to a perpetual license.

Zuri Group offers the same pricing options of its Data Warehouse Replication Utility. This tool was built in conjunction with a client that needed to overcome limitations in Blackbaud's Hosting Environments. A nightly refresh sends data to a local instance of BB Data Warehouse. The client can utilize Tableau to support its reporting needs. Blackbaud does not currently support Tableau. Another client elected to purchase the utility to support greater flexibility in adding dimensions to the Data Warehouse from its non-Blackbaud applications.

Constituent Update Customization:

$15,000 Fixed Price

The specification for the customization is included as an example in our Project Management response.

Zuri Group has included our working Customization Catalogue in the response. We often use existing customizations as a foundation to build similar features for another Zuri Client. Doing so allows Zuri Group to deliver more cost effectively in many cases, leveraging existing work to the larger CRM Community.

Zuri Group will extend pricing to all VASCUPP Zones defined in the map.