

## REQUEST FOR PROPOSALS #0291A

**For a Constituent Relationship Management (CRM) System**  
in support of  
ELIZABETH GLASER PEDIATRIC AIDS FOUNDATION (EGPAF)  
1140 Connecticut Avenue, NW, Suite 200  
Washington, D.C. 20036

**Firm Deadline: November 4, 2019**

The Elizabeth Glaser Pediatric AIDS Foundation (EGPAF), a non-profit organization, is the world leader in the fight to eliminate pediatric AIDS. Our mission is to prevent pediatric HIV infection and to eliminate pediatric AIDS through research, advocacy, and prevention and treatment programs. For more information, please visit [www.pedaids.org](http://www.pedaids.org).

### **BACKGROUND**

EGPAF's Development team is responsible for raising unrestricted, mission-based fundraising. This unrestricted funding allows EGPAF to explore pioneering new projects, to expand work into new communities, and grow the impact of our lifesaving services.

Our team focuses on raising funds from individuals, corporations and foundations, and peer-to-peer programs. We also manage special event fundraising, digital marketing, and planned giving efforts. EGPAF recently surpassed our organization's 30<sup>th</sup> anniversary, and we're continuing to mark this milestone with efforts to increase our visibility, engage new audiences, and reinvigorate our fundraising efforts. As a result, we are in need of an upgrade to our existing CRM.

### **PURPOSE/SCOPE OF WORK**

EGPAF is seeking a cloud based constituent relationship management platform to support the fundraising efforts of its Development team. Requested features include:

- System to sync and track donors' activity, engagement details, and donation history
- Easy automated and on demand reporting
- Digital marketing features
- Donor integration

EGPAF wishes to begin installation and training in the first half of 2020, with a goal to begin effective live operations by September 2020. **(Please let us know if you believe this live date to be practical.)**

## **CONTRACTOR DELIVERABLES**

EGPAF is seeking a cloud based constituent relationship manager database. The desire is to phase into a centralized system to track donor interactions across multiple fundraising programs, fundraising offices and internal departments. The ideal system would also be able to perform email marketing, create donation webpages, host digital advocacy campaigns, and seamlessly integrate these actions with supporter records.

The successful Contractor shall be responsible for the final approved design, installation, implementation, and commissioning of the CRM system, including development of web forms, user acceptance testing, system integration and connectivity to existing payment resources.

## **MINIMUM REQUIREMENTS:**

EGPAF expects the Contractor to perform the related professional services (e.g. best practices guidance, training, project management, implementation, integration and report development) in a timely and professional manner.

The ideal Contractor shall have experience in successfully implementing the proposed solutions at similar agencies to EGPAF and/or in larger nonprofit organizations.

The ideal Contractor will have the ability to integrate with third party fundraising platforms (i.e. Rallybound).

## **EGPAF RESPONSIBILITIES:**

The Senior Development Manager at EGPAF will serve as the main contact for the Contractor, as well as other key staff. EGPAF will host regular meetings with the Contractor during the contract period. EGPAF will work with the Contractor to ensure the detailed donor records currently preserved in the CRM do not get lost during transition.

## **LOGISTICS:**

### **INSERT PLACE(S) OF PERFORMANCE OF SERVICES**

Contractor will perform Services at their facility and if necessary, also at EGPAF.

## **KEY CONTRACT TERMS:**

The anticipated Contract type is: *Firm Fixed Price*. Unless stated otherwise in the Statement of Work, the Contractor is responsible for providing equipment and/or supplies required to perform the Services.

All deliverables provided to EGPAF must be furnished for the use of the EGPAF without royalty or any additional fees.

All Materials will be owned exclusively by EGPAF. Contractor will not use or allow the use of the Materials for any purpose other than Contractor's performance of the Contract without the prior written consent of EGPAF.

Should the agreed delivery or completion dates not be met in the case of fault of the Contractor EGPAF shall be entitled to demand payment of late delivery penalties amounting to 0.1% of the value of the late Deliverables/Services per started week of delay up to a maximum amount of 5% of the entire value of the Contract.

### **EVALUATION CRITERIA AND SUBMISSION REQUIREMENTS:**

EGPAF appreciates detailed information on the potential Contractor's platform, front-end and back-end function, as well as details on how the system could be implemented while preserving the data currently recorded in our CRM. Please provide answers and examples to the following questions and requests.

#### ***System Capabilities***

- What are the prime features of your CRM system?
- Please provide examples of your user experience, including dashboards, donor records, and document storage.
- Does your system include the capacity to send email? If so, please provide details.
- Does your system include the ability to build donation pages? If so, please provide details.
- Does your system include any advocacy campaign functions? If so, please provide details.

#### ***Implementation***

- Describe your onboarding process, timeline, and the support your team provides to train in-house staff on the use of your tool. Include, at a minimum, a timeline with dates, milestones and deliverables.
- Please provide a visual representation of your implementation process and the necessary EGPAF resources that we would have to provide in order to assist with the implementation of your solution.
- Describe the training program content provided during implementation, the method of delivery, and materials. How much on-site training is provided? How much remote training is provided?

#### ***Support***

- What kind of uptime do you typically deliver? Please identify your service level agreements.
- What is your guaranteed response time for responding to emergency requests? Nonemergency requests?

- What support options are available for your solution after go-live? Is support available 24x7x365?
- Where are your support staff located and during what hours are they available? What provisions do you have in place for after-hours support?
- Describe the type of user documentation to be provided with the solution (manuals, contextual help for user screens, tutorials, on-line resources).
- Provide any examples you can of large outages that may have occurred with your solution, how long they lasted, and how you resolved them.
- Describe how scheduled/unplanned maintenance and downtime notifications are communicated.
- Describe the turnover from installation support to routine operational support.
- Please document vendor plans how many of vendor's employees will be assigned to EGPAF's project team.
- Please document Contractor's expectations regarding EGPAF staffing support for both the implementation and the on-going, in-house operation of the system.
- Please document Contractor's ability to drive the project, including project manager availabilities and capabilities. Indicate the proposed project manager's level of experience in running projects of this scope.

#### *Maintenance and Updates*

- What is your update methodology?
- What is the frequency for major software releases?
- Are there any planned future releases we should be aware of?
- Does the client have the ability to determine when/if an update will be applied?
- Is a testing environment provided? Is it accessible as needed by the client? Is there an additional cost associated with this environment?
- Do you allow or support third-party enhancements to the tool?
- As applicable describe any customization/configuration choices that will impede future updates.

#### *Integrations*

- Describe how your solution integrates and streamlines workflows (via API, ETL, FTP or bots) to other tools. If you do not have this ability, please describe the options or process a client can go through to achieve this.
- Does your solution integrate with Dropbox? Office 365? Please include any other solutions your tool integrates with that are not already mentioned.
- What are your requirements for payment processing?

#### *Data Conversion of Constituent Records*

- EGPAF has an existing database of constituent records on its current fundraising CRM, Abila Millennium, which hosts data gathered via offline transactions and online transactions from Rallybound and Blue State Digital platforms. This data would ideally be converted in an automated fashion to the new system.
- Please describe proposed methodology for conversion. Include Contractor's support, EGPAF's responsibility, and anticipated duration of the conversion

effort.

- Does the Contractor recommend that EGPAF provide a dump of the database so that the Contractor can convert at Contractor's site; will Contractor provide conversion programs for EGPAF to execute on-site at EGPAF; or will Contractor assist EGPAF in developing conversion programs for EGPAF to convert the data? What resources will be needed to facilitate this?

### ***Accessibility and Cloud Hosting***

- How does the solution leverage the cloud and/or local components?
- If your solution is not cloud-based, how is it accessed? Identify any third party software or hardware EGPAF would be required to purchase outside of the scope of this proposal.
- Through what computing and mobile devices can your solution be accessed? What limitations, if any, are there working on a mobile device?
- If cloud-based
  - How long has your solution been in the cloud?
  - Are there any elements of your solution that are not cloud-based?
  - Describe any functional limitations present when using the solution in varying web browsers
- Does your solution require any on-site devices?

### ***Configuration, Security, and Privacy***

- Are the accounts for your system configured using a single sign-on option (SSO)? EGPAF prefers SSO that is configured through Okta.
- How does your tool provide data encryption in transit and at rest?
- Do you perform regular 3rd party penetration testing of your solution (note: this is not the same as vulnerability scanning)?
- Please provide an SSAE 16 SOC 2 report if available.
- Describe the system architecture of the proposed solution. Include high level diagram with narrative descriptions.
- Describe your network, system, and web application vulnerability management process. Please share any results of third-party assessments/scans.
- Describe security controls that enforce separation of duties.
- Describe your ability to prevent, detect, and respond to intrusions, including processes in place to do so.
- Does your solution support two-factor authentication?
- Describe your support for data loss prevention.
- Detail any ISO accreditations.

EGPAF will accept the proposal that presents the best value. All proposals will be evaluated against the following Evaluation Criteria. Each proposal must contain the items listed in the Submission Requirements column in the following chart. Please submit your Submission Requirements in the order that they appear below.

<b>Evaluation Criteria</b>	<b>Submission Requirements</b>	<b>Weight</b>
1. Past performance of similar work	1. 3 professional references from similar past projects with phone and email contact information and one or more examples of prior similar work	20%
2. Contractor's proposed process and approach to meet our needs efficiently	2. A maximum 5-page written proposal outlining a proposed approach, budget, and timeline for implementation	25%
3. Timeframe of implementation	3. Estimated hours, timeframe with deliverables, final delivery date. Include any dates that you would not be available to work on this assignment	20%
4. Total fixed price	4. Total fixed price for all activities, including fee.	15%
5. Qualifications of proposed individuals	5. CV/Resume of proposed individuals to work on this project	20%
<b>Total</b>		<b>100%</b>

All applicants are required to be registered and authorized to perform the scope of work in the place of performance.

**PROPOSED TIMELINE:**

**October 9, 2019** – Release of RFP

**October 18, 2019** – Submission of Contractual and Technical Inquiries: Cathy Colbert, Senior Awards and Compliance Officer, at [ccolbert@pedaids.org](mailto:ccolbert@pedaids.org). No phone calls please.

**October 25, 2019** – Question and Answer Response Document posted on EGPAF website at <http://www.pedaids.org/pages/contracting-opportunities>.

**November 4, 2019** - Completed proposals must be delivered electronically by the deadline mentioned on page one to: Cathy Colbert, Senior Awards and Compliance Officer, [ccolbert@pedaids.org](mailto:ccolbert@pedaids.org) with a “cc” to Craig Evans, Director of Development, [cevans@pedaids.org](mailto:cevans@pedaids.org) and Katie Cunningham, Senior Manager of Development, [kcunningham@pedaids.org](mailto:kcunningham@pedaids.org).

**November 11, 2019** – Contractors Chosen for Demonstrations; Demonstration Scenario sent.

**November 18, 2019** – Final decision announced and Offerors notified.

**November 20, 2019** – Contract executed and Services begin.

**Please note it is our best intent to comply with the above timeline but unavoidable delays may occur.**

### **ADDITIONAL INFORMATION**

**It is very important that all proposals and communications must be identified by the unique RFP# reflected on the first page of this document.**

Any proposal not addressing each of the foregoing items could be considered non-responsive. Any exceptions to the requirements or terms of the RFP must be noted in the proposal. EGPAF reserves the right to consider any exceptions to the RFP to be non-responsive.

Late proposals may be rejected without being considered.

This RFP is not an offer to enter into agreement with any party, but rather a request to receive proposals from persons interested in providing the services outlined below. Such proposals shall be considered and treated by EGPAF as offers to enter into an agreement. EGPAF reserves the right to reject all proposals, in whole or in part, enter into negotiations with any party, and/or award multiple contracts.

EGPAF shall not be obligated for the payment of any sums whatsoever to any recipient of this RFP until and unless a written contract between the parties is executed.

Equal Opportunity Notice. The Elizabeth Glaser Pediatric AIDS Foundation is an Equal Employment Opportunity employer and represents that all qualified bidders will receive consideration without regard to race, color, religion, sex, or national origin.

### **ETHICAL BEHAVIOR:**

As a core value to help achieve our mission, EGPAF embraces a culture of honesty, integrity, and ethical business practices and expects its business partners to do the same. Specifically, our procurement processes are fair and open and allow all vendors/consultants equal opportunity to win our business. We will not tolerate fraud or corruption, including kickbacks, bribes, undisclosed familial or close personal relationships between vendors and Foundation employees, or other unethical practices. If you experience or suspect unethical behavior by a Foundation employee, please contact Doug Horner, Vice President, Awards, Compliance & International Operations, at [dhorner@pedaids.org](mailto:dhorner@pedaids.org) or the Foundation's Ethics Hotline at [www.reportlineweb.com/PedAids/](http://www.reportlineweb.com/PedAids/) Any vendor/consultant who attempts to engage, or engages, in corrupt practices with the Foundation will have their proposal disqualified and will not be solicited for future work.