Questions for EGPAF RFP #0291A

1. Is the full RFP response limited to 5 pages?
   - 5 pages is a recommended guideline.
2. What is the current constituent list size for the organization?
   - Approximately 100,000
3. What CRM platform are you converting from?
   - Millennium, an Abila product.
4. If we are able to meet the organization needs to a point of replacing systems such as Rallybound and/or Blue Stat Digital over integration, is that an option?
   - We are amendable to considering this option.
5. What is your current technology footprint? Do you plan on replacing all aspects or are there certain solutions that you want integrated to the new CRM outside of Rallybound, Dropbox or Office 365 which was noted in the RFP?
   - We recently made the decision to move our file management from Dropbox to OneDrive. If the proposed solution can integrate with Okta that would be beneficial. An integration or mechanism to integrate lockbox donations and images would be a bonus. We currently bank with Bank of America.
6. Will this CRM house data from all of the countries you work with around the world and what specific language or currency requirements do you have due to your global presence?
   - This CRM will be used for donor relationships, the majority of which are U.S. based. It will be used internally by U.S. staff who speak English. We do receive donations from international audiences, so the CRM would house that financial data.
7. How many usable email addresses do you currently have in your housefile?
   - Approximately 100,000
8. How many emails do you send out annually? (ie. 1 email to 1,000 people = 1,000 emails)
   - Approximately 3.4 million. We send approximately 35 emails a year via our digital marketing campaign, and we also communicate regularly via email with major donors.
9. Who are your top three target markets when sending emails?
   - Current donors, prospective donors, and lapsed donors to reengage.
10. What KPI's do you track or do you want to track with email marketing?
    - Donations, open rates, unsubscribe rates, click throughs, donations made because of social media.

11. What overall KPI's does the marketing team have?
    - Our primary KPI for email marketing is fundraising.
12. What additional digital channels do you use to communicate? Mobile SMS? Social Listening/ Posting? Digital Ad Management? What tools are being used to manage them and are they a part of this RFP?
    - We do not use SMS to communicate with our supporters. We do have strong social media channels, and do run ads on those platforms. That is handled by our External Affairs team, and new tools are not a part of the RFP. However, we would like to be able to better capture constituents' activity related to EGPAF on these platforms.
13. What is the structure of your Marketing team? Do they fit under the general Development Team umbrella?
    - Digital fundraising/marketing is managed by employees on the Development team, with input and coordination with select colleagues on the External Affairs team.
14. Are you amenable to replace BSD or should we assume this will remain in place?
    - We are amenable to replacing BSD and will consider this option as a part of this scope.
15. Where is your direct marketing strategy done? In house? Third party agency?
    - Our digital direct marketing is done in house. This fall we are contracting with a third party firm to relaunch an offline direct mail program.
16. Who builds out your direct marketing segmentation?
    - Members of the Development team.
17. Where are donations caged? In house? Third party agency?
    - Donations are processed by a third party credit card processor and/or lockbox. We keep financial information in the CRM donor record, such as copies of checks, but do not retain credit card information.
18. Are you using acquisition lists?
    - Yes.
19. What is your general ledger tool?
    - Great Plains
20. Is the desire for your fundraising CRM to be a GL sub-ledger?
    - This is not necessary at this time.
21. What is the process for posting donations to the GL?
    - Download gift report from Millennium, then review and compare the report against lockbox and wire deposits (excluding BSD/Wepay donations). Import to Great Plains.
22. How do you handle donor or fundraising inquiries from the website?
    - We have a dedicated email address for donor inquiries. It is managed by Development staff.

23. Is it managed through an inbox or a case system?
    - Via an inbox.
24. Do you process/cage donations internally or externally?
    - Externally
25. Would the internal team or external team be processing them into the new system?
    - Internal
26. Do you have giving levels or programs?
    - Not at this time.
27. How are the level managed and recognized?
    - N/A
28. How are Legacy / Planned Donors handled?
    - They are managed by Development staff.
29. Do you use any wealth screening tools or prospect research tools currently? If so, which ones?
    - The primary prospect research tool we use is Lexis Nexis.
30. Is there a desire for a donor self self service portal?
    - We are open to receiving information about the benefits of this option. Currently we only use this for our peer to peer fundraising portal. We would need to retain this ability if the system were to include peer to peer fundraising capabilities.
31. On average, how many constituents would be logging into that portal?
    - We have about 2,000 constituents logging into our peer to peer fundraising portal each year.
32. What tool is used as your current CRM system of record.
    - Millennium by Abila
33. How many users will be accessing this new CRM tool?
    - 5-10 users
34. Which departments or business units will be accessing this new CRM tool?
    - Development, potentially External Affairs, Advocacy, Accounting
35. What reporting and analytics capabilities do you need, is it all focused on donor management and retention? Would it include predictive intelligence, ex, major gift indicators?
    - We are open to reporting that includes major gift indicators.
36. Could you please provide record counts for the following (estimates are fine):
    - Households - 870,000
    - Contacts
    - Campaigns / Appeals – 650
    - Donations – 377,000
    - Cases

- Events
- Event Attendees: Currently our database doesn't explicitly track event response
- Interactions / Tasks – 18,000
- Notes - 300
- Attachments / Files – 10,000

37. What tools are you currently using for online donations? Will this tool be replaced in the migration?
    - Blue State Digital is our primary tool.
38. Are you using any online peer to peer fundraising tools? If so, will this tool be replaced in the migration?
    - Rallybound is our primary tool for third party fundraising.
39. Will moving from your current credit card merchant provider be in scope for this project?
    - Not at this time.
40. Where are your recurring donations stored and processed?
    - They are processed and store in the Blue State Digital system.
41. How are you currently managing refunds of online gifts?
    - They are processed manually by internal staff.
42. What tools will be integrating with your new fundraising solution? Eg WealthEngine
    - The current system integrates with Blue State Digital and Rallybound.
43. The RFP mentioned Dropbox and Office365. Could you please elaborate on the business use of those tools?
    - We recently made the decision to move our file management from Dropbox to OneDrive. The ultimate goal with the use of these tools is to foster a more collaborative environment enabling employees to access information in an efficient and effective manner. With respect to a CRM system we'd likely upload/link to donor correspondence, emails, proposals, etc.
44. Are you currently using any integration tools, ie MuleSoft, Dell Boomi, JitterBit?
    - No. Our integration from BSD and Rallybound is facilitated by a customized utility that Abila created to work with these outside platforms.
45. If so, what tool(s) are you using? N/A
46. What are the frequency of the integrations?
    - Weekly
47. Please describe your advocacy needs?
    - An easy to use system that allows constituents to reach out to their representatives through email and social media.
48. What tool(s) are you using to manage your advocacy needs today?

- Blue State Digital.

49. What was your total fundraising revenue in 2017? 2018?
    - 2017: $3,045,123
    - 2018: $3,577,255
50. How many total gifts did you receive in 2017? 2018?
    - 2017: 11,583
    - 2018: 8,920
51. What was your total annual online giving totals excluding event fundraising in 2017? 2018?
    - 2017: $135,924
    - 2018: $181,768
52. How many total online gifts did you receive excluding event revenue in 2017? 2018?
    - 2017: 767
    - 2018: 2,366
53. What are the teams/roles will make up the EGPAF team?
    - Members from our Development, IT, External Affairs, and Finance teams will be involved in this project.
54. Prior to the November 4th submission date would your team be available for a brief 60 minute phone call to solidify the scope of the project in order to tighten up the project investment details?
    - No, but we are open to scheduling this conversation prior to the next demonstration phase.
55. The proposed timeline states that contractor will be chosen for demonstration on November 11th along with the final demonstration scenarios and the final vendor selection will be made November 18th. With this information, is it accurate to infer that final product demonstrations will also be scheduled the week of November 11th? We have a concern if the demo is pushed to the following week (Nov 18-22), we will be attending Dreamforce which is our biggest event of the year with nearly 200k attendees. We hope you will be part of this event next year!
    - We may consider adjusting the timeline to accommodate all vendors selected to advance.
56. Firm Fixed Price – Licenses will be fixed annual price for three years (assuming a 36- month term with Salesforce). Slalom's Implementation costs will be provided in Time & Materials, not fixed price. Slalom will provide milestones. Is this acceptable?
    - We may consider it, but it depends on the contract structure.
57. Is EGPAF looking for the RFP response to only include responses to the Evaluation and Criteria Question sections (on pages 3-5 of the RFP) and the

information included in the table (page 6 of your RFP – references/5pg approach proposal/timeframe/pricing/resume quals) -- Not a full RFP response including Executive Company Summaries or Technology Product Overview?
    - A full RFP is preferred, even if that exceeds the recommended 5-page limit.

58. Have you outlined your success criteria and the KPIs to identify what would make this project successful? If so, can you please provide?
    - We would ideally like a system that allows us to retain the 30+ years of donor history we currently have in our CRM while also updating to a more easy to use, functional database that includes dynamic reporting and information capturing.
59. Have you allocated budget? If not, what is your budgeting process for this project?
    - We have allocated budget for this project in the 2019 and 2020 fiscal years.