

November 12, 2020

REQUEST FOR PROPOSALS

Optimizing our digital marketing and online fundraising ecosystem for donors and community members

Dear Sir or Madam,

Conservation International Foundation (hereinafter referred to as “Conservation International” or “CI”), is issuing a Request for Proposals (RFP) for a platform solution for our digital marketing and online fundraising ecosystem. The attached RFP contains all the necessary information for interested Offerors.

For three decades (established in 1987), Conservation International (CI) has been a leader in conservation. We work with communities, governments and businesses throughout Asia, Africa, Latin America and the Pacific Ocean to secure the critical benefits that nature provides to humanity. Since our inception, we’ve helped to protect more than 6 million square kilometers (2.3 million square miles) of land and sea across more than 70 countries. Currently with offices in 27 countries and 2,000 partners worldwide, our reach is truly global.

Conservation International is actively seeking proposals to reevaluate its current online fundraising and digital marketing ecosystem. Conservation International has used Luminate Online since 2003 for online donations, both one-time and monthly recurring, as well as email communications with a community list of about 850,000+ active email addresses. This strategy is led by the global support office based in Arlington, Virginia, but fundraising and email marketing campaigns are also deployed in various forms by a subset of field offices, e.g., Brazil, Japan, Singapore and Belgium, etc.

Proposals are due by December 9, 2020. Interested Offerors can submit their questions to ciprocurement@conservation.org.

All offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work and in accordance with CI’s Code of Ethics.

Conservation International’s reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, and Passion and Teamwork. CI’s Code of Ethics (the “Code”) provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI’s core values, and outlines minimum standards for ethical conduct which all parties must adhere to.

Any violation of the Code of Ethics should be reported to CI via its Ethics Hotline at www.ci.ethicspoint.com

Concerns regarding the integrity of the procurement process and documents shall be reported to www.ci.ethicspoint.com under the procurement and purchasing activities.

Request for Proposals

RFP # BC0001

For the provision of:

Optimizing CI's digital marketing and online fundraising ecosystem

Contracting Entity:

CI Foundation

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Section 1. Instructions and General Guidance

1.1 Introduction

CI, the Buyer, is soliciting offers from platforms and implementation partners to submit proposals to carry out the deployment of an optimized digital marketing and online fundraising ecosystem.

OBJECTIVES: This RFP will consider either a new platform or an ecosystem of tools to replace our current usage of Luminate Online. It will also consider an implementation partner with whom CI can partner to follow design best practices, meet our current use cases, allow CI space to grow our digital strategy, and surpass industry benchmarks for metrics like donation form completion rates and email open rates. This will include at least the following products:

- Online donation forms, including credit card, Apple Pay, Google Pay, cryptocurrency, international currencies and real-time currency conversions, and multi-language support
- Email marketing platform, including email distribution, constituent records, audience segmentation and lead scoring
- Social and search ad landing pages, including forms and surveys
- Donor surveys
- Analytics dashboards for email and fundraising reporting
- IP mapping engine

An ongoing support contract with the implementation partner will also be considered.

This RFP does not obligate CI to execute a contract nor does it commit CI to pay any costs incurred in the preparation and submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI.

1.2 Offer Deadline

Offerors shall submit their offers electronically at the following email address, ciprocurement@conservation.org.

Offers must be received no later than December 9, 2020 by 5:00PM ET. Offerors are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may not be considered. CI cannot guarantee that late offers will be considered.

1.3 Instruction for Offerors

All proposals must be submitted in one volume, consisting of a technical proposal and a cost proposal. This RFP is broken down into two components. The first component will consist of a submission of both a technical proposal and a cost proposal. All bids must be received by the Offer Deadline above, and the firms shall be notified on December 30 whether the firm has made it to the “**Demonstration stage**” or the second component.

Technical Proposal

1. Minimum Technical Requirements — The technical proposal must include confirmation that the proposed solution will meet the following technical requirements:

Solution is a single platform or seamlessly integrated ecosystem of solution components	Yes / No
Applications are cloud-based with demonstrated application security and service reliability	Yes / No
Applications offer customer support portal that includes documentation plus 24/7 access to user support technicians	Yes / No
Solution has a hosting infrastructure that can accommodate dozens of transactions per minute during peak activity while not charging for unused capacity during normal activity	Yes / No
Solution broadly supports data encryption at rest	Yes / No
Solution offers Office 365 as an SSO or SAML source	Yes / No

2. Use cases — The technical proposal must also include clarification about whether the proposed solution can meet CI’s use cases, as detailed in the attached spreadsheet (download here: <https://www.conservation.org/rfp-use-cases>). These use cases reflect both core functionality that’s required to launch a minimum viable product by May 31, as well as functionality we want the platform to accommodate in the future. The use cases are grouped by persona – they are not in order of priority – though high priority use cases have been identified. Please review each use case and select one of the following values in the corresponding columns:

Status (Column C):

Yes, by May 31	This use case can be comfortably accommodated by May 31
Yes, but not by May 31	This use case can be comfortably accommodated by the proposed solution but will require more time to be deployed
No, not possible	This use case can be accommodated by the proposed solution

Level of effort (Column D):

Core functionality	This use case can be accommodated using core functionality in the proposed solution
Possible with custom configuration	This use case can be accommodated using existing functionality but will require configuration with specialized technical knowledge of the solution
Requires third-party tool to implement	This use case can be accommodated in proposed solution but requires integrating a third-party tool. If this requires an additional licensing fees or maintenance, please make note under Caveats.

NA

The level of effort is irrelevant because the proposed solution cannot accommodate this use case

Caveat (Column E):

Please elaborate on how your proposed solution will address (or not address) this use case, if you think additional detail is helpful.

Successful completion of a bid is based upon the submission of the attached Case Description in the Excel file. Incorrect or incomplete Case Descriptions will be disqualified for the second component.

3. **Implementation Partner Solution Recommendation, Methodology and Experience** — The following details will also need to be included in the technical proposal to be considered.

Platform Solution Recommendation

- Names of proposed platforms and implementation partner, plus contact information.
- Diagram of proposed solution platforms if multiple components are recommended to meet requirements and use cases.
- A Written Information Security Plan (WISP) that is publicly available.
- Confirmation of having an Incident Response Plan (IRP). If not publicly available, please provide the SOC 1 or SOC 2 reports to confirm existence of an IRP.
- Written description of data portability including confirmation whether the platform or partner has experience importing data from Luminate Online and / or other CRMs.
- Written description of how data can be exported from the proposed solution to other CRMs.
- Description of ongoing maintenance requirements of the proposed solution.
- Provide the Service Level Agreement and an estimated meantime to recovery.
- Complete CI's Vendor Security Management Questionnaire (download here: <https://www.conservation.org/rfp-security-survey>).

Implementation Methodology

- Description of project management methodology and roles and responsibilities of implementation partner. Applicant should provide a list of roles of staff anticipated to be required as part of the project implementation, a description of the activities on the project, and their hourly rate. If roles and responsibilities are expected of CI, please provide a description here.

Implementation Partner Experience

- Present experience with optimizing donation form design:
 - Top five recommendations to improve existing design (<https://www.conservation.org/donate>) with citations for any industry best practices referenced
 - Examples of recent work, either mockups or live examples
- Documents supporting that platforms and partner implementation partner have worked with large, international nonprofits

COST PROPOSAL

The cost proposal must include estimates in USD (and corresponding hours, if relevant) for design, build, QA and deployment of proposed solution, as well as recurring costs to maintain proposed solution, by year.

The cost proposal is used to determine which proposals are the most advantageous and serves as a basis of negotiation for award of a contract. CI reserves the right to request additional cost information if the evaluation committee has concerns of the reasonableness, realism, or completeness of an offeror's proposed cost.

Please input estimated hours for the blue field below.

	Software	Support (External)
Design of donation forms <i>(if customization is possible in proposed solution)</i>	NA	Hours
		USD
		Number of hours to optimize design of CI donation form, if allowed by platform(s) <ul style="list-style-type: none"> • Discovery • User experience design • Web design (2 mockups with 3 rounds of feedback) • Identify 5 areas that should be AB tested with CI users
Initial setup <i>(minimum viable product launched on May 31, if applicable)</i>	USD	Hours
	Setup fees for platform(s), if applicable.	USD
	Number of hours to set-up proposed ecosystem, including: <ul style="list-style-type: none"> • Discovery / Road mapping • Development • QA • Addressing bug fixes • Deployment 	
Initial setup <i>(post May 31, if applicable)</i>	USD	Hours
	Setup fees for platform(s), if applicable.	USD
	<ul style="list-style-type: none"> • Development • QA • Addressing bug fixes • Deployment 	

Per transaction charge		%	
		USD	
	USD \$__ + __% charged per transaction by donation processor. If this is a multi-tiered price structure, please include details about each tier.		
Training	NA		Hours
			USD
		to lead three training sessions: 1. Content management (email and ad landing pages) 2. Content management (donations) 3. Technical maintenance of platform(s)	
Annually		USD	Hours
	Licensing fees for platform(s). Please specify if CI will be billed monthly or annually.		USD
			to perform basic maintenance to the platform(s), like security updates, as well quickly address more serious issues as they arise.

1.4. Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process. Offerors must strictly follow these deadlines.

The full deployment of the new digital marketing ecosystem – with necessary set up and data migration – will be by May 31, 2021.

November 6, 2020	RFP available.
November 20, 2020	Deadline for written questions.
December 2, 2020	Written responses from CI posted.
December 9, 2020	Proposal responses due.
December 9 – 31, 2020	CI seeks clarifying questions and selects finalists for demonstrations. Schedule live demonstrations. Schedule data privacy / security discussions.

December 30, 2020	Selected firms to move to the second component for demonstrations.
January 4 – 22, 2021	Live platform demonstrations. Data privacy / security discussions. References for finalists checked.
January 25 – 29, 2021	Finalists scored. Winning bidder selected.
February 1 – 26, 2021	Draft and approve legal agreements. Sign contract.
March 1 – May 31, 2021	Development period. Build out platform(s) following guidance specified in contract. Includes QA and UAT.
June 1, 2021	Deploy ecosystem.
July 31, 2021	Deployment of ecosystem enhancements, if required.

The dates above may be modified at the sole discretion of CI. Any changes will be published/advertised in an amendment to this RFP.

1.5. Evaluation and Basis for Award

A platform and implementation partner who meet the following criteria will be selected as finalists for live demonstrations in January of 2021:

Platform meets the technical requirements specified above	Yes / No
Platform is built in a widely understood language and supported by a wide variety of external partners (i.e., knowledge to administer platform is not proprietary to a single partner)	Yes / No
Implementation partner has demonstratable expertise with recommended platform	Yes / No
Implementation partner can clearly and confidently present cost and time estimates to set up proposed solution by May 31 deadline	Yes / No
Implementation partner will sign CI's Service Provider Agreement, Global Data Processing and Data Security Addendum, and Unilateral Non-Disclosure Agreement, if awarded project	Yes / No

The finalists selected for the second component will conduct **2** live demonstrations, the award will be made to the offeror whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP, meets the technical capability requirements, and is determined to represent the most advantageous to CI. Scoring will be based on the following:

	Percentage
Data privacy and security requirements <ul style="list-style-type: none"> • Meets or exceeds technical requirements outlined above 	20
Platform <ul style="list-style-type: none"> • Meets use cases (minimum viable product deployed by May 31) • Meets use cases (possible after May 31) • 24/7 customer support portal that includes documentation • Strong references asserting above findings • Clear and reasonable contract lengths 	40
Implementation partner <ul style="list-style-type: none"> • Possesses a critical mass of staff and resources to successfully meet May 31 deadline • Proven strategic and technical expertise • Understanding of current industry best practices and applicable privacy / data security requirements • Experience designing donor experiences that improve conversion rates, donation size, brand evangelism and donor retention • Compatible project management methodology • Proven track record building solutions for large, international nonprofits • Strong references verifying above qualities 	15
Pricing (platform) <ul style="list-style-type: none"> • Initial set-up fees are reasonable • Donation processing fees are reasonable • Annual licensing fees are reasonable 	15
Pricing (implementation partner) <ul style="list-style-type: none"> • Initial set up fee and proposed support contract are reasonable 	5
Staff resources <ul style="list-style-type: none"> • CI staff time and expertise to set up ecosystem is reasonable • CI staff time and expertise to maintain ecosystem is reasonable 	5

Section 2. Scope of Work, Deliverables, and Deliverables Schedule

2.1. Scope of Work

This RFP will address the digital marketing and online fundraising ecosystem as described in the use cases detailed in the attachment. As part of the implementation of the solution, we expect the implementation partner to execute the following activities:

- Detailed business analysis of the attached use cases to clarify requirements
- Detailed solution design for priority use cases to be addressed by a May 31 deployment
- Detailed solution design for remaining use cases to be addressed after May 31, if necessary
- Installation or Initial setup of platform components
- Configuration of platform to meet requirements of use cases
- Execution of Quality Assurance testing to confirm platform meets requirements/acceptance criteria of use cases
- Demonstration of functionality and/or User Acceptance Testing scripts for CI
- Evaluation and resolution of identified bugs/enhancements found during User Acceptance Testing
- Development and Execution of Deployment Plan for May 31 Launch
- Post Production User support for issues identified during initial launch, including researching issues, updating solution to resolve issues, provide training/clarification on issues identified.
- Knowledge transfer sessions on Content Management and Technical Maintenance of the solution
- Migration of data required for May 31 Launch

The Implementation Partner will lead the project management of the implementation and will be required to provide the following under this engagement:

- A project manager to oversee the execution of the project
- A project timeline that provides a list of activities, resources requirement, planned start and end dates, critical milestones, and dependencies for each functional area
- A risk management process for identifying risks associated with the project timeline and deliverables
- A collaboration tool and process, including meetings, centralized data repository, process to facilitate the activities required for the project, and an area where bugs can be logged and their resolution tracked.

Note: Conservation International prefers an agile project management methodology but is open to other methodologies based upon the implementation partner's experience and what the proposed solution requires.

The Implementation Partner will be required to provide the following technical requirements:

- Detailed backup plan

- Detailed security plan
- Detailed transition plan
- Code repository, if applicable

As part of this engagement, Conservation International will provide access to subject matter experts, system owners, system and content administrators, source system, and any other supporting materials that are required for the activities under this engagement. CI may provide the code repository, if applicable, upon request.

Final delineation of roles and responsibilities will be based upon proposals and will be finalized as part of final contract negotiation.

2.2. Deliverables & Deliverables Schedule

For vendors interested in responding to this RFP, if awarded the project, are expected to produce the following deliverables by May 31, 2020:

#	Activity	Due Date	Deliverable	Acceptance Criteria
	Project Plan	March 15, 2021	Timeline document that lists what will be deployed by May 31 and what has to be developed afterward, dividing responsibilities between CI and the implementation partner	High priority use cases will be addressed by May 31. Functionality that requires most content build out or data migration is front-loaded at beginning of project. Roadmap is realistic with ample time for QA (partner) and UAT (CI).
	Donation form design	March 31, 2021	Two final mockups that incorporates three rounds of feedback from CI.	Can be feasibly deployed on proposed solution. Reflects industry best practices with promise to improve conversion rates or average donation size.
	Donation form design – opportunities to A/B test with CI users	May 31, 2021	List of 5 areas or functions of the donation form design that should be tested with CI donors.	Can be easily A/B tested with CI donors to improve performance of donation forms.

	Deployment of donation form ecosystem	TBD	A platform where we can quickly deploy forms where users can easily make donations.	Meets technical requirements. Meets all relevant use cases.
	Recurring donor migration	TBD	Plan to migrate existing recurring donors to proposed solution. Design seamless experience for recurring donors to continue their monthly support.	Minimize disruption to current recurring donor community while respecting data privacy and security regulations.
	Email design template	TBD	A branded email template that can be replicated quickly and easily.	Meets technical requirements. Meets all relevant use cases. Mobile optimized. Performs well on all major email hosts. Displays predictably and does not negatively impact deliverability.
	Deployment of email platform	TBD	A platform where CI can manage constituents, group them by current segments and reliably send optimized, branded emails.	Meets technical requirements. Meets all relevant use cases.
	Social and search ad landing pages	TBD	Landing pages to serve each existing ad on Facebook and Google search.	Meets technical requirements. Meets all relevant use cases.
	Data migration	TBD	Migrate Luminate data like constituent records including contact information, engagement data and giving history.	Allows smooth transition of email schedule to new platform and no visible disruption in the experience of CI community members. Allows accurate comparisons to previous years' data.

	Redirect engine	TBD	Document mapping existing Luminate donation forms to donation forms in the proposed solution	Deployment causes no 404's and donors' intent will be preserved (e.g., restricted vs. unrestricted gifts)
	Analytics dashboard	May 31, 2021	An analytics dashboard that displays real-time donation and email reporting, customizable by admin user.	Meets all relevant use cases.
	Knowledge transfer (content admin)	May 31, 2021	Live demonstration with content admins at CI. Robust written documentation.	Content managers at CI understand day-to-day management of system, both email marketing and online fundraising.
	Knowledge transfer (technical admin)	May 31, 2021	Live demonstration with technical admins at CI. Robust written documentation.	Technical administrators at CI understand maintenance procedures.
	Project management	Start of contract through May 31, 2021	Weekly burn down reports submitted. Issues database maintained. Project plan developed. Risk register developed.	Reports received by CI. Issues database approved by CI. Plan approved by CI. Register approved by CI.
	In-person donation transaction platform	TBD	A platform where gala attendees can easily make a donation.	Meets technical requirements. Meets all relevant use cases.

2.3 Additional documentation

Included in RFP:

- Background: current platform and tools in use
- CI's Ethics Standards
- CI's Vendor Security Management Questionnaire (download here: <https://www.conservation.org/rfp-security-survey>).

Not included in RFP but available upon request. Winning bidder will be required to sign before project can begin:

- CI's Global Data Processing and Data Security Addendum
- CI's Confidentiality Agreement (NDA)
- CI Policies for Non-Employee Acknowledgement

Current Environment

Website: www.conservation.org

Conservation.org is built on the Sitefinity enterprise content management system with about two dozen custom layout elements and content widgets to allow for a modular approach to page layout.

Objectives:

- Convey thought-leadership and educate visitors on CI's core programs around science, policy and partnerships.
- Compel visitors to take actions, e.g., sign petitions, share content via social, calculate their carbon footprint, receive conservation news via email, etc.
- Compel visitors to make unrestricted donations to support CI.

Platforms in use:

- Luminate / Blackbaud (process one-time and monthly donations, email subscription, email distribution, Facebook and search ad landing pages)
- Mobile Commons (SMS and MMS communications, including marketing and fundraising broadcasts)
- Stripe (process donations for mostly international donors who report difficulty with Luminate, but is also utilized on <https://footprint.conservation.org>. Use Donorbox forms as back-up)
- Donorbox, GoodWorld, Peak15 (third parties that integrate with Stripe as a processor)
- Mailchimp (used by some teams and field offices for email marketing)
- Raiser's Edge (donor relationship management)
- ImportOmatic (gift data and contact information exported from Luminate Online to Raiser's Edge)
- Google Analytics, Google Tag Manager and CrazyEgg (web analytics)
- OneTrust Pro (cookie opt-in banner)
- Tandem Vault (image asset management)
- imgIX (image renditions)
- Typeform (online quizzes)
- MapBox and CartoDB (online maps)
- Bitpay (Bitcoin donation service)

APPENDIX 2

ETHICS STANDARDS

Conservation International's reputation derives from our commitment to our core values: Integrity, Respect, Courage, Optimism, and Passion and Teamwork. CI's Code of Ethics (the "Code") provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to.

Any violations of the Code of Ethics should be reported to CI via its Ethics Hotline at www.ci.ethicspoint.com.

CI relies on the personal integrity, good judgment and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

Integrity:

- Act in good faith, responsibly, with due care, competence and diligence and maintain the highest professional standards at all times.
- Comply with all contractual terms as well as all applicable laws, rules and regulations, domestic and international, in every country where Services are carried out.
- Provide true representation of all Services performed.
- Never engage in any of the following acts: falsification of business document or receipts, theft, embezzlement, diversion of funds, bribery, or fraud.

Transparency:

- Avoid conflicts of interest and not allow independent judgment to be compromised.
- Not accept gifts or favors from sub-contractors, suppliers or other 3rd parties that would negatively impact the provision of Services to CI.

Accountability:

- Disclose to CI, at the earliest opportunity, any information you have or become aware of, that may result in a real or perceived conflict of interest or impropriety.
- Implement activities, provide Services, and manage staff and operations in a professionally sound manner, with knowledge and wisdom with the goal of a successful outcome per the terms of this Agreement.

Confidentiality:

- Not disclose confidential or sensitive information obtained during the course of your work with CI.
- Protect confidential relationships between CI and other 3rd parties.

Mutual Respect and Collaboration:

Engage with indigenous peoples and local communities in which CI works in a positive and constructive manner that respects the culture, laws, and practices of those communities, with due regard for the right of free, prior and informed consent.

I hereby acknowledge receipt of CI's Code of Ethics and certify agreement and compliance therewith.

FOR SERVICE PROVIDER:

By: _____

Title: _____