Question and Answer (Q&A)

Annual Giving Digital Fundraising

RFP# AG001

1. Q: Are there specific social media channels you would like to run ads on other than Facebook?
   A: Currently we use Facebook and Instagram for ads.

2. Q: Are you actively investing in paid social channels other than Facebook, such as Twitter?
   A: We run Facebook and Instagram ads but not Twitter.

3. Q: Are you open to running ads on Microsoft’s Ad network (Bing, MSN, Yahoo)?
   A: Yes and we do run ads on Bing and through Verizon display.

4. Q: Are you interested in us providing organic social media management?
   A: No.

5. Q: Would we be able to receive FTP access to your current website?
   A: We will not be providing as part of this process.

6. Q: Do you have specific numbers on previous ad spend, cost per click, click through rate and conversion rate for Google Ads in past campaigns?
   A: We will not disclose this information during this process.

7. Q: Do you have an annual budget in mind for this project?
   A: We are not including a project budget figure in this RFP.

8. Q: Have you ever been awarded a Google Ad Grant?
   A: Yes, we’ve had a Google Grant for 7+ years.

9. Q: What monthly spend level does your Google Grant have?
   A: $40,000 in credits

10. Q: Do you have ecommerce tracking where we would be able to track donation amounts in Google Analytics by channel?
    A: No, we don’t.

11. Q: What is the average monthly traffic to your website?
    A: We will not disclose this information during this process.

12. Q: What is your primary web analytics tool?
    A: Google Analytics. We have both Universal Analytics and GA4 deployed which give different results once we deployed a cookie opt-in banner on our website in January. Based on our calculations, this caused a 60+% reduction in trackable web traffic on Universal Analytics.

13. Q: Would you be willing to provide us Google Analytics read-only access so we can audit your current efforts as a part of this process?
    A: We will not disclose this information during this process.
14. Q: Are there any media files that Conservation International can provide at all? Example: videos for YouTube Ads, imagery of certain projects for display ads.
   A: We are not providing specific media files as part of this process. You will find various examples of our marketing content throughout our website at conservation.org as well as through our social media pages.

15. Q: Are there services you would like to receive from your digital fundraising partner that you are not receiving today? What do you appreciate most about your current partner? What are unmet needs you have identified if any?
   A: We are not disclosing information about our existing vendor.

16. Q: What is your ideal account structure to best serve your program?
   A: We are open to various account structures that will maximize the efficiency of the team.

17. Q: Can you provide a copy of your brand guidelines?
   A: We will not disclose this information during this process.

18. Q: Which organizations do you benchmark yourselves against? Which nonprofit organizations do you most admire and why?
   A: Teamwork is a guiding value for CI, recognizing that inclusion, collaboration and cooperation are fundamental to achieving a healthy and prosperous world. We partner with a number of other environmental NGOs around the globe including The Nature Conservancy, World Wildlife Fund, Wildlife Conservation Society, National Audubon Society, to name a few.

19. Q: How do you define your target donor audience today?
   A: Our backers come from all walks of life, but they all have one thing in common: They know that we need nature to survive.
   We are currently looking into survey efforts to better understand our donors and their specific areas of interest.

20. Q: What is the size of your email house file broken down by segment (full file, leads, email donors, etc.)?
    A: Please see the answer to question #44.

21. Q: Can you provide insight into the digital fundraising goals you've outlined (e.g., acquire at least 10,000 new online donors, grow your monthly donors and email subscribers)? What have your goals been in previous years? Are there larger organizational goals for fundraising that these goals ladder up to?
    A: Please see the answer to question #28.

22. Q: If you had to name the one thing holding you back from reaching these goals, what would that be and why?
    A: This work has not been a priority in the past, but we have seen success over the past few years with our digital program. We are now looking to scale up our program from our current baseline in a crowded digital space.
23. Q: Are there any revenue goals associated with new donor and growth goals? Are these goals for gross or net revenue?
   A: We have gross revenue goals for the year. In terms of evaluating performance, we look at net revenue and long-term value for our digital investments.

24. Q: What percent of revenue does digital fundraising make up from the overall fundraising program?
   A: Firms selected to interview stage will have access to additional information upon signature and acceptance of a non-disclosure agreement.

25. Q: What tactics for integration have you leveraged previously? What has worked and what has not worked?
   A: We are not completely clear on what is meant by “tactics for integration”. We consider our program to take a multi-channel approach where we are coordinating offline and online efforts where appropriate.

26. Q: How much digital revenue is generated by gifts under $1,000?
   A: Firms selected to interview stage will have access to additional information upon signature and acceptance of a non-disclosure agreement.

27. Q: How much digital revenue is generated from gifts between $1,000-$10,000?
   A: Firms selected to interview stage will have access to additional information upon signature and acceptance of a non-disclosure agreement.

28. Q: What are your revenue goals for the upcoming year? Are there any other relevant goals that you can share that we should be aware of?
   A: Firms selected to interview stage will have access to additional information upon signature and acceptance of a non-disclosure agreement.
   We would like to share our Development team goal which is to advance the donor pipeline to continue growing and upgrading donors. This will be done by:
   - Growing the Annual Giving donor base through acquisition and stewardship.
   - Implementing and refining the pipeline for Midlevel and Major Giving.
   - Increasing retention rates for Individual Giving donors.

29. Q: How much digital revenue is generated from recurring gifts?
   A: Recurring gifts make up roughly 25%-30%.

30. Q: Do you have a reporting dashboard that tracks revenue across multiple platforms? If yes, can you describe the services or systems you use to ingest, store, and visualize that data?
   A: We currently use Raiser’s Edge as our CRM platform and our Systems and Analytics team uses Power BI to create various dashboards to visualize our various acquisition and retention metrics.

31. Q: Can you provide your historic campaign calendars? Is the campaign calendar provided for the coming year an increase or decrease compared to previous efforts?
A: We will not be providing calendars during this process. The number of campaigns outlined in the RFP is consistent with prior years. We are also open to new suggestions.

32. Q: Would you be willing to share your year-end campaign/strategy brief from this past year?  
   A: We will not be providing this information during this process.

33. Q: What KPIs are your performance-driving metrics for the paid digital media program?  
   A: For lead generation we look at cost per lead and donor conversion. For direct to donate efforts, we look at the annual return on ad spend for one-time and monthly gifts combined.

34. Q: What are your benchmarks / current KPIs for click-through rate, response rate, average gift, cost to acquire and return on ad spend by channel (e.g., search, social, display)?  
   A: For benchmarks we look at industry standards and public data on benchmarks for environmental and other non-profits.

35. Q: What is the most important KPI in your digital fundraising program (i.e., net revenue, gross revenue, donor file size, return on ad spend, cost to acquire)?  
   A: It is a combination of net revenue and long-term value. Donor file size is also important to ensure we are bringing on enough new donors for consistent year-over-year growth.

36. Q: What KPIs are your performance-driving metrics for the email fundraising program?  
   A: We look at several different KPIs. When evaluating campaign performance, we look at open rates, response rate and revenue raised during specific campaign timeframes year over year (both by channel and overall).

37. Q: What are your benchmarks / current KPIs for open rate, click-through rate, response rate, average gift, and unsubscribe rate?  
   A: For FY21 our overall average online donation is $67 and unsubscribe rate is 0.25%. Please see answer to question 53 for additional details.

38. Q: How would you describe your organization’s balance between risk and growth?  
   A: Please see answer to question 35.

39. Q: How are you currently segmenting efforts across programs? How is paid media budget allocated for lead generation, new donor acquisition, retention, and monthly giving? What is your segmentation strategy and donor journey for email marketing across these programs?  
   A: We try to allocate fairly evenly between lead generation (acquisition) and direct to donate ads. We receive donations from current and monthly donors through our paid media budget, but we don’t have a separate budget allocation for these areas. That said, we are open to different approaches.

40. Q: Please provide email results by segment for the last three fiscal years.  
   A: We will not be providing this information during this process.

41. Q: How many emails typically make up an “email campaign” as referenced in the RFP? E.g., how many total email messages are you looking for your partner agency to manage? Please include details on email segmentation or versioning.
A: We did not originally specify to allow for different email campaign strategies and approaches. Outside of Giving Tuesday and end of year we send between 4-6 email communications per campaign and each communication has multiple segments. Please see answers to questions 54, 55 and 57 for additional details.

42. Q: Have you previously appended email addresses to your direct mail donors? If so, does email append management fall under the scope of this opportunity?
A: No, this does not currently fall under the scope.

43. Q: What is your email suppression strategy? Have you recently performed any email hygiene and deliverability projects to inform this strategy?
A: We have multiple email engagement suppressions based on open counts, along with other special interest group suppressions, to ensure emails are sent to only our most engaged constituents. We have performed bi-annual email list clean-ups as well as consulted with deliverability specialists to inform our suppression strategy.

44. Q: What is the size of your active email list? Of that list, what number are recurring monthly donors?
A: Our current mailable list size is 638,000, of which we actively email about 10% of our most engaged constituents. We are looking to potentially expand email re-engagement efforts as an additional way to grow our email audience.

45. Q: Would you be willing to share read-only access to your paid digital media accounts (Google Ads, Bing/Microsoft Ads, Facebook Ads Manager, Display platforms) to allow our team to audit as a part of this process? If not, please provide account exports and/or other results by channel for the last three fiscal years.
A: We will not be providing this information during this process.

46. Q: Do you have an annual paid media plan that details channel investment areas and % of spend that you would be willing to share with us? If not, how are you currently allocating budget by channel? Are you able to share the % dedicated to Search vs. Social vs. Display?
A: We will not be providing our current paid media plan during this process.

47. Q: What is your primary tag management system?
A: Google Tag Manager

48. Q: What do you use for donation and fundraising reporting?
A: We use Raiser's Edge as our primary fundraising and donor reporting source.

49. Q: If you could articulate your top challenges in this area, what would they be (Data Tracking & Analysis)?
A: Attribution can be a challenge along with understanding the role of each channel in bringing on new supporters, including offline channels.

50. Q: Do you have a preferred proposal response format (e.g., Word vs. PPT)?
A: Responses in the format of Word or PDF is preferred.
51. Q: Do you currently have any vendors or other partner agencies with whom your Digital Fundraising agency would collaborate?  
   A: No.

52. Q: Are you looking to refresh your brand guidelines or tone and voice guidance?  
   A: No, we are not looking to refresh our brand guidelines. There are opportunities to test various messaging strategies and fundraising copy within our current brand guidelines.

53. Q: What is your average open rate, click-to-open rate, and donate rate?  
   A: For FY21 our average open rate is 26%, average click-through rate is 0.9% and average conversion rate is 0.11%.

54. Q: What are your typical segments for email? Do you use an RFM model?  
   A: Our audience is mainly segmented by donor status (non-donor, active donor, sustaining donor, lapsed donor, mid-level donor). We also periodically send to special interest groups or custom audiences.

55. Q: How many emails do you send in a year?  
   A: We send an average of 50 fundraising emails per year. Each email consists of multiple audience segments that utilize conditional content.

56. Q: Can you describe the focus areas for each of your 7 core email fundraising campaigns?  
   A: In previous years they have been themed around things like Earth Day (April), World Elephant Day (August) and World Wildlife Day (March), to name a few. We try to ensure we are incorporating all aspects of our work and projects that fall into these main areas:
   - Protecting Nature to Halt Climate Catastrophe
   - Protecting the Ocean to Protect Humanity
   - Sustainable Lands and Waters

57. Q: The RFP references EOY and Giving Tuesday as high-volume email periods. Can you share details on email volume during these time periods?  
   A: Between Giving Tuesday and EOY we send an average of 20-23 fundraising emails, with each email consisting of multiple segments.

58. Q: What platforms are you currently using for advertising (e.g., Google, Bing, Facebook, Instagram, Twitter)?  
   A: Google, Bing, Facebook, Instagram, Verizon display

59. Q: Can you provide an overview of how you've currently built your audiences in Facebook (assuming you are using the platform)?  
   A: We have built audiences through creating look alike models.

60. Q: What attribution model are you using to assess media efficiency (e.g., 30 day click, one day view)?  
   A: We attribute a gift based on the final source the donor gave through.

61. Q: What is your current ROAS by platform?  
   A: We generally see a positive annual return for our combined direct to donate fundraising efforts (paid
62. Q: Can you provide any recent advertising performance data?
   A: We will not be providing this information during this process.

63. Q: How would you describe your current donor audience (e.g., demographics, needs, desires, etc.)?
   A: Please see the answer to #19.

64. Q: Can you share more about your reporting cadence? What do you feel is lacking in your current reporting infrastructure?
   A: We mainly seek reporting to understand the performance of our monthly paid media strategy in addition to the performance of our fundraising campaigns across channels.

65. Q: Are you using any testing tools like Optimizely to run A/B tests on your website or donation forms?
   A: Yes, we use Google Optimize.

66. Q: Do you have the ability to create landing pages like quizzes, surveys, or petitions for lead generation purposes?
   A: Yes.

67. Q: How many agencies are being invited to submit proposals? How many finalists will be invited to present in person?
   A: This RFP is publicly posted therefore we do not have a limit on the number of proposals that can be submitted. We do not have a pre-determined limit on the number of finalists to present in person.

68. Q: Will answers to questions be shared with all agencies responding to this RFP?
   A: Yes.

69. Q: Who are the main stakeholders participating in this evaluation process?
   A: Participants are from the Development and Brand + Communications teams, both of whom are actively working on fundraising strategy.

70. Q: Can you tell us a bit more about the internal CI teams with whom we would work most closely?
   A: The internal engagement strategy will be discussed during finalist interviews.