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](http://www.ci.ethicspoint.com)*

*Concerns regarding the integrity of the procurement process and documents shall be reported to [www.ci.ethicspoint.com](http://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](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](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](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.

<table>
<thead>
<tr>
<th>Software</th>
<th>Support (External)</th>
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</thead>
<tbody>
<tr>
<td>Design of donation forms (if customization is possible in proposed solution)</td>
<td>NA</td>
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<tr>
<td>Initial setup (minimum viable product launched on May 31, if applicable)</td>
<td>Setup fees for platform(s), if applicable.</td>
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<tr>
<td>Initial setup (post May 31, if applicable)</td>
<td>Setup fees for platform(s), if applicable.</td>
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<td></td>
<td></td>
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<tr>
<td>Per transaction charge</td>
<td>USD</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----</td>
</tr>
<tr>
<td>USD $__ + __% charged per transaction by donation processor. If this is a multi-tiered price structure, please include details about each tier.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Training</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>to lead three training sessions:</td>
</tr>
<tr>
<td>1. Content management (email and ad landing pages)</td>
</tr>
<tr>
<td>2. Content management (donations)</td>
</tr>
<tr>
<td>3. Technical maintenance of platform(s)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annually</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensing fees for platform(s). Please specify if CI will be billed monthly or annually.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>USD</th>
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<tbody>
<tr>
<td>to perform basic maintenance to the platform(s), like security updates, as well quickly address more serious issues as they arise.</td>
</tr>
</tbody>
</table>

### 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 12, 2020**: RFP available¹.
- **November 20, 2020**: Deadline for written questions.
- **December 2, 2020**: Written responses from CI posted.
- **December 9, 2020**: Proposal responses due.

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¹ The original posting had a November 6 date which was a typo. The correct date has now been updated to November 12th.
<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 30, 2020</td>
<td>Selected firms to move to the second component for demonstrations.</td>
</tr>
<tr>
<td>March 1 – May 31, 2021</td>
<td>Development period. Build out platform(s) following guidance specified in contract. Includes QA and UAT.</td>
</tr>
<tr>
<td>June 1, 2021</td>
<td>Deploy ecosystem.</td>
</tr>
<tr>
<td>July 31, 2021</td>
<td>Deployment of ecosystem enhancements, if required.</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Yes / No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Platform meets the technical requirements specified above</td>
<td></td>
</tr>
<tr>
<td>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)</td>
<td>Yes / No</td>
</tr>
<tr>
<td>Implementation partner has demonstratable expertise with recommended platform</td>
<td>Yes / No</td>
</tr>
<tr>
<td>Implementation partner can clearly and confidently present cost and time estimates to set up proposed solution by May 31 deadline</td>
<td>Yes / No</td>
</tr>
<tr>
<td>Implementation partner will sign CI’s Service Provider Agreement, Global Data Processing and Data Security Addendum, and Unilateral Non-Disclosure Agreement, if awarded project</td>
<td>Yes / No</td>
</tr>
</tbody>
</table>

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:
<table>
<thead>
<tr>
<th>Section 2. Scope of Work, Deliverables, and Deliverables Schedule</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data privacy and security requirements</td>
</tr>
<tr>
<td>• Meets or exceeds technical requirements outlined above</td>
</tr>
<tr>
<td>Platform</td>
</tr>
<tr>
<td>• Meets use cases (minimum viable product deployed by May 31)</td>
</tr>
<tr>
<td>• Meets use cases (possible after May 31)</td>
</tr>
<tr>
<td>• 24/7 customer support portal that includes documentation</td>
</tr>
<tr>
<td>• Strong references asserting above findings</td>
</tr>
<tr>
<td>• Clear and reasonable contract lengths</td>
</tr>
<tr>
<td>Implementation partner</td>
</tr>
<tr>
<td>• Possesses a critical mass of staff and resources to successfully meet May 31 deadline</td>
</tr>
<tr>
<td>• Proven strategic and technical expertise</td>
</tr>
<tr>
<td>• Understanding of current industry best practices and applicable privacy / data security requirements</td>
</tr>
<tr>
<td>• Experience designing donor experiences that improve conversion rates, donation size, brand evangelism and donor retention</td>
</tr>
<tr>
<td>• Compatible project management methodology</td>
</tr>
<tr>
<td>• Proven track record building solutions for large, international nonprofits</td>
</tr>
<tr>
<td>• Strong references verifying above qualities</td>
</tr>
<tr>
<td>Pricing (platform)</td>
</tr>
<tr>
<td>• Initial set-up fees are reasonable</td>
</tr>
<tr>
<td>• Donation processing fees are reasonable</td>
</tr>
<tr>
<td>• Annual licensing fees are reasonable</td>
</tr>
<tr>
<td>Pricing (implementation partner)</td>
</tr>
<tr>
<td>• Initial set up fee and proposed support contract are reasonable</td>
</tr>
<tr>
<td>Staff resources</td>
</tr>
<tr>
<td>• CI staff time and expertise to set up ecosystem is reasonable</td>
</tr>
<tr>
<td>• CI staff time and expertise to maintain ecosystem is reasonable</td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th>#</th>
<th>Activity</th>
<th>Due Date</th>
<th>Deliverable</th>
<th>Acceptance Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Project Plan</td>
<td>March 15, 2021</td>
<td>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.</td>
<td>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).</td>
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<tr>
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<td></td>
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<tr>
<td>2</td>
<td>Donation form design</td>
<td>March 31, 2021</td>
<td>Two final mockups that incorporates three rounds of feedback from CI.</td>
<td>Can be feasibly deployed on proposed solution. Reflects industry best practices with promise to improve conversion rates or average donation size.</td>
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<td>3</td>
<td>Donation form design – opportunities to A/B test with CI users</td>
<td>May 31, 2021</td>
<td>List of 5 areas or functions of the donation form design that should be tested with CI donors.</td>
<td>Can be easily A/B tested with CI donors to improve performance of donation forms.</td>
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<tr>
<td>4</td>
<td>Deployment of donation form ecosystem</td>
<td>TBD</td>
<td>A platform where we can quickly deploy forms where users can easily make donations.</td>
<td>Meets technical requirements. Meets all relevant use cases.</td>
</tr>
<tr>
<td>Task</td>
<td>Status</td>
<td>Description</td>
<td>Constraints</td>
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<tr>
<td>Recurring donor migration</td>
<td>TBD</td>
<td>Plan to migrate existing recurring donors to proposed solution. Design seamless experience for recurring donors to continue their monthly support.</td>
<td>Minimize disruption to current recurring donor community while respecting data privacy and security regulations.</td>
<td></td>
</tr>
<tr>
<td>Email design template</td>
<td>TBD</td>
<td>A branded email template that can be replicated quickly and easily.</td>
<td>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.</td>
<td></td>
</tr>
<tr>
<td>Deployment of email platform</td>
<td>TBD</td>
<td>A platform where CI can manage constituents, group them by current segments and reliably send optimized, branded emails.</td>
<td>Meets technical requirements. Meets all relevant use cases.</td>
<td></td>
</tr>
<tr>
<td>Social and search ad landing pages</td>
<td>TBD</td>
<td>Landing pages to serve each existing ad on Facebook and Google search.</td>
<td>Meets technical requirements. Meets all relevant use cases.</td>
<td></td>
</tr>
<tr>
<td>Data migration</td>
<td>TBD</td>
<td>Migrate Luminate data like constituent records including contact information, engagement data and giving history.</td>
<td>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.</td>
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<tr>
<td>Redirect engine</td>
<td>TBD</td>
<td>Document mapping existing Luminate donation forms to</td>
<td>Deployment causes no 404’s and donors’ intent will be preserved (e.g.,</td>
<td></td>
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<tr>
<td>Service Description</td>
<td>Start Date</td>
<td>Details</td>
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<tr>
<td>Analytics dashboard</td>
<td>May 31, 2021</td>
<td>An analytics dashboard that displays real-time donation and email reporting, customizable by admin user.</td>
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<td>Meets all relevant use cases.</td>
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<tr>
<td>Knowledge transfer (content admin)</td>
<td>May 31, 2021</td>
<td>Live demonstration with content admins at CI. Robust written documentation.</td>
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<tr>
<td></td>
<td></td>
<td>Content managers at CI understand day-to-day management of system, both email marketing and online fundraising.</td>
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<td></td>
</tr>
<tr>
<td>Knowledge transfer (technical admin)</td>
<td>May 31, 2021</td>
<td>Live demonstration with technical admins at CI. Robust written documentation.</td>
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<td>Technical administrators at CI understand maintenance procedures.</td>
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<tr>
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<td>Reports received by CI. Issues database approved by CI. Plan approved by CI. Register approved by CI.</td>
<td></td>
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</tr>
<tr>
<td>In-person donation transaction platform</td>
<td>TBD</td>
<td>A platform where gala attendees can easily make a donation.</td>
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<tr>
<td></td>
<td></td>
<td>Meets technical requirements.</td>
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</tbody>
</table>

### 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](https://www.conservation.org/rfp-security-survey)).
- Q&A Answers Posted on December 2, 2020

**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](http://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](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: _________________________
Q&A
REQUEST FOR PROPOSALS
RFP# BC0001

1. Q: What were the primary motivations for CI to evaluate new digital marketing solutions at this time?

   A: Primarily, it’s been a number of years since CI deployed the current iteration of our current digital marketing and online fundraising platform. It was time to evaluate whether the system meets our current requirements and future ambitions and, if not, consider alternatives.

2. Q: What are the primary improvements that CI wants over your current solution?

   A: The use cases outlined in our RFP were drafted to address our current requirements and future ambitions. Please see RFP for additional details.

3. Q: What are the biggest challenges with your current technology stack?

   A: The use cases outlined in our RFP were drafted to address challenges with our current technology stack. That being said, our biggest challenges are most likely international non-USD credit card donations, digital wallets and cryptocurrency. Please see RFP for additional details.

4. Q: What are your goals around digital marketing and online fundraising for the coming year and beyond?

   A: Simply put, CI wants to grow its email list, compel more community members to provide unrestricted support and grow our community of monthly recurring donors.

5. Q: Which specific programs are primary focus areas for growth in the coming year and beyond?

   A: We are focused on growing our programs holistically and looking for opportunities to scale and test messaging with new audiences. Some primary focus areas include acquiring new donors, reengaging lapsed supporters and community members and upgrading to monthly and mid-level giving.

6. Q: How has COVID impacted your fundraising and other online engagement (events, etc) this year and what plans do you have as it related to technology in the coming year?
A: In terms of fundraising, the most significant disruption from COVID was the postponement of our twice-annual galas.

7. **Q:** Was your current technology provider able to meet your needs during the current pandemic (and related crisis)? Does your current provider have integrations with tools such as Zoom?

A: Yes, they did meet our current requirements but it wasn’t integrated with our current platform. We have used Microsoft Teams for internal meetings. Increasingly, we are using Zoom for events that include non-CI staff, like board meetings and “meet the expert” webinars tailored for current donors.

8. **Q:** Do the field offices have additional email lists that would add to the 850,000+ active emails mentioned?

A: Yes, but the number is in the hundreds, cumulatively

9. **Q:** Do you expect the field offices' email/marketing systems to feed data and reporting up to CI HQ’s database? Or would you prefer they are completely separate?

A: We would want a parent / child relationship where they can use email templates provided by HQ and can build their own lists that are maintained separately from HQ to respect the members “opt-in” wishes. HQ should have access to their system mainly for training purposes and to provide tech support, but can also quickly enforce compliance with brand standards or email best practices, if required, and access analytics when necessary.

10. **Q:** Can you provide a list of your field offices?

A: [https://www.conservation.org/about/global-offices](https://www.conservation.org/about/global-offices)

11. **Q:** Which currencies and cryptocurrencies do you want to support? What percentage of fundraising comes in via non-USD currencies?

A: We currently only support USD on Luminate Online. When we launched the International Carbon Calculator earlier this year, accepting non-USD donations was critical so we developed an experience that leveraged Stripe to accept ARS, AUD, BRL, CAD, COP, EUR, GBP, JPY, KRW, MXN, SGD, and NZD. Unfortunately, this campaign was postponed due to COVID, so we don’t know which currencies would have been most popular. Based on Luminate data, we believe CAD, EUR and GBP would be the non-USD currencies adopted most quickly.

12. **Q:** What cryptocurrencies do you want to support? What percentage of fundraising comes in via cryptocurrencies? Do you currently use Bitpay for all cryptocurrency processing and do you intend to keep Bitpay?
A: We currently use Bitpay to primarily accept donations of Bitcoin: https://www.conservation.org/bitcoin. The tool however accepts any cryptocurrency a user has in their online crypto wallet as well as Bitcoin, Bitcoin Cash, XRP, Ethereum and USD Tokens by scanning the QR code. We have received very few transactions since launching this experience over two years ago – well under 1% of total online transactions – but it’s important to leadership that this option is available. We also like the option for the donor to offset the emissions footprint of their transaction, if this is possible for each crypto. In the future, we would like to explore accepting Facebook Libra and other crypto that are pegged to currency because they act as cash rather than a speculative asset.

13. Q: What are your biggest challenges with designing online forms in Luminate?

A: The biggest challenge is the fact that editing the donation form design, layout, or user experience requires contracting with an external developer. The design layout in Luminate is also not user-friendly and requires a lot of system knowledge to make even modest edits. We would like to have a platform that allows us to update our donation forms with a more user-friendly WYSIWYG editor.

14. Q: Do you currently offer real-time currency conversions?

A: Yes, but only on the International Carbon Calculator which uses Stripe to process donations. Currency conversions are performed every 24 hours via oanda, to avoid exceeding our daily limit on API calls. While it is a requirement that we use real-time currency conversions, it is not a requirement that we use oanda and the cost of any tool must be considered.

15. Q: Which languages do you currently support?

A: On our website and associated subsites, we currently support English, Latin American Spanish, Brazilian Portuguese, French, Japanese and Indonesian. The international carbon calculator also supports Korean, German, European Spanish and British English. We also have an office in China but they host their platforms domestically.

16. Q: Are you open to moving off Mobile Commons to a digital marketing / online fundraising solution that also incorporates SMS?

A: Yes, we will consider a contract renewal with Mobile Commons in early 2021.

17. Q: Do you currently have difficulties with the integration between Luminate and Raiser’s Edge?

A: No, we do not.
18. **Q:** You will also be replacing Mailchimp, correct? Do you currently have difficulties with the integration between Mailchimp and other systems?

**A:** Mailchimp was adopted by field offices because CI didn’t have an official policy on international list building nor a system that could enforce our brand and technical requirements as well as meet their marketing and fundraising needs. As a result, we have a number of Mailchimp accounts across the organization, none of which are integrated with external systems. We would like to find a platform that would provide the option and opportunity to centrally manage these efforts, empowering field offices with the tools they need.

19. **Q:** What other vendors are being evaluated?

**A:** Due to confidentiality concerns regarding the privacy of the other vendors, we cannot disclose this information.

20. **Q:** Do you have preferred formats for RFP sections 1 (Minimum Technical Requirements) and 3 (Implementation Partner Solution Recommendation, Methodology and Experience)?

**A:** We do not have a preferred format.

21. **Q:** Would you be open to considering an implementation consultant? In this capacity, we could help CI make the platform or ecosystem selection and also do the implementation planning. Instead of offering one platform, or single set of tools, we’d spend some time at the beginning of our engagement to learn about your organization and help you make the right selection from the many offerings.

**A:** We performed a robust discovery process to finalize the technical requirements and use cases in the RFP. Respondents are welcome to recommend an integrated ecosystem of tools to meet these requirements and use cases. Those recommendations will be a critical component of how we score RFP responses and thus decide to whom the project will be awarded in January.

22. **Q:** Can you tell us a bit more about who from CI we would work most closely with? Which CI stakeholders will be the ultimate decision-makers in your RFP process?

**A:** This RFP process is managed by the Procurement Officer, and proposals will be scored by colleagues in Brand and Communications, Development, Information Technology, Finance and General Counsel.

23. **Q:** We understand that an “ongoing support contract with the implementation partner will also be considered.” Can you tell us more about the ongoing agency support you’d be looking for?

**A:** From the technical specifications of the recommended platforms to the robustness of accompanying documentation and training, it will be critical that CI is provided with the resources to perform essential tasks in the daily management of the proposed solution, from
content management to backend administration. CI would welcome, however, a relationship with the implementing agency where more complicated technical updates can be performed in a timely manner or, on the front end, new marketing features can be deployed. External expertise in digital marketing and fundraising is always appreciated.

24. Q: We imagine an organization of your size has multiple agency partners. Can you describe those working relationships, what scopes of work they cover, and how you envision your agencies interacting and collaborating (if necessary)?

A: Relating to web work, we typically have two types of partnerships: 1. Projects that require design and build time to meet a well-defined list of deliverables for a fixed price, and 2. agencies that provide ad-hoc technical support, estimating requests as received and drawing from a pre-determined bank of hours. That being said, these types of engagements are uncommon – our web systems are almost entirely supported internally – so this project will most likely not require engaging with another agency.

25. Q: Are you open to including usability testing as part of the design process for specific forms?

A: Yes, absolutely.

26. Q: Are there any budget parameters you can share for this scope of work?

A: There are no budget parameters we can share beyond what is outlined in the RFP.

27. Q: Can you describe in greater detail where your current Luminate implementation falls short?

A: The use cases outlined in our RFP were drafted to address our current requirements and future ambitions, both of which include the resolution of existing pain points. Please see RFP for additional details.

28. Q: We understand you have an active list size of 850,000. How many are active donors, give recurring donations, or have saved payment information?

A: This data is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.

29. Q: How would you describe your current audience (e.g., demographics, needs, desires, etc.)?

A: This data is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.

30. Q: In what ways is your current audience segmented?

A: Our audience is mainly segmented by donor status (non-donor, active donor, sustaining donor, lapsed donor). We have multiple email engagement suppressions, along with other special interest group suppressions, to ensure emails are sent to only our most engaged constituents. We also periodically send to special interest groups or custom audiences.
31. **Q:** One of your key requirements is for administrators to be able to set up landing pages. What features do these landing pages typically have?

**A:** Landing pages are generally Luminate surveys for our lead acquisition campaigns on Facebook. Here’s an example:

https://act.conservation.org/site/SSurvey?ACTION_REQUIRED=URI_ACTION_USER_REQUEST&S&SURVEY_ID=6300. There’s room for changes but the basic requirements are: title; image; description; fields for first name, last name, email and ZIP code; an opt-in checkbox; a submit button; © details; and the ability to populate fields in the CRM with URL parameters (to differentiate campaigns or audience segments, etc).

32. **Q:** How were CI’s use cases developed? What user research impacted their development?

**A:** The first slate of use cases were drafted by an external agency who interviewed CI stakeholders in the Brand & Communications, Development, Information Technology, and General Counsel divisions. This first draft roughly captured our current usage of Luminate Online, though they added use cases that better reflected what’s possible in digital marketing and online fundraising. These use cases were greatly expanded on by the same internal team to accommodate current challenges and opportunities for growth, which includes insights from web analytics, A/B tests as well as anecdotal input from community members and donors.

33. **Q:** What large data analyses are being done?

**A:** There are an innumerable list of reports that are performed daily, weekly, monthly and annually across all managers of our digital marketing and online fundraising teams. However, we have pulled a limited list of highlights. In terms of email marketing, the data most frequently analyzed include open rates, click-through rates (by content), unsubscribe rates and both soft and hard bounces. These data are tracked by campaign and across larger time series to identify changes in performance. Looking at online fundraising, donation count, revenue and average donation are segmented by source (e.g. website, social and search ads, email, etc.) and tracked daily. Comparisons are made year over year. Donation count and revenue is frequently tracked for matching campaigns or partners. With respect to email marketing and online fundraising, our monthly web analytics reports dive into which pieces of content have the highest email signup rates and donation conversion rates. Email leads are segmented by source and tracked over time to watch their donation conversion rates and average donation amount, by month on list.

34. **Q:** What kind of regular reports do you get about online activity?

**A:** Looking broadly, the web team watches real-time reporting in Google Analytics but performs more in-depth monthly analyses, including content marketing, email acquisition and online fundraising — both unrestricted and restricted, one-time and monthly recurring. Comparisons are made month over month and year over year. Reports are distributed to Brand & Communications and Development teams. Preliminary donation data is available in Google Analytics but official data comes from Raiser’s Edge; consequently, donation data is not available to other channel managers in real-time. Side note: Google Analytics data is expected to decrease significantly once a cookie opt-in banner is deployed across our website in January. All teams perform a variety of analyses to inform their strategies; the most important takeaway is that we have an analytics dashboard that is customizable for each user or group and meets the use cases
outlined in the RFP.

35. Q: Are you currently doing experimentation/testing on your donation forms?
A: Yes, but very limited testing like the number of buttons and the presence of certain graphics. It is our goal to perform more robust testing like single step vs. multi-step forms, or single elements across multiple forms so we can reach statistical significance more quickly.

36. Q: What data is flowing into which systems?
A: 

![Data Flow Diagram]

37. Q: How do you currently handle provisioning of new hardware or services?
A: This RFP likely won’t require provisioning new hardware aside from services, especially cloud based, which can also cover virtual machines. This will require approval by CI’s IT department and CI’s General Counsel Office will need to review the company’s Terms and Conditions. If Personally Identifiable Information is handled, the company will also need to complete IT’s Vendor Security Management Questionnaire and GCO will also need to review the company’s data privacy policy.

38. Q: How do you currently handle analytics tracking and tagging?
A: A shared spreadsheet where we can standardize naming for Luminate parameters (src and s_src) and Google Analytics (Medium, Source, Campaign Name and Content). “Content” and “s_scr” are the same long label which includes more information like: Site/Platform, acquisition vs direct to donate, Ad Theme, Date, Audience Type, Audience Seed/Agency and Agency.
### 39. Q&A: Fundraising campaign types being utilized: Please select any or all of the following campaign types you have interest in:

<table>
<thead>
<tr>
<th>Campaign Type</th>
<th>Interested in? (Y/N)</th>
<th>Doing Currently (Y/N)</th>
<th>Current Tool in Use</th>
<th>Annual Online Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Donation Form – General donation form linked out from your main org website.</td>
<td>Yes</td>
<td>Yes</td>
<td>Luminate Online</td>
<td></td>
</tr>
<tr>
<td>Additional Donation Forms – Leveraged for targeted appeals, birthday asks, etc.</td>
<td>Yes</td>
<td>Yes</td>
<td>Luminate Online, Stripe</td>
<td></td>
</tr>
<tr>
<td>Crowdfunding – Targeted appeal with a full landing page to better showcase the story behind the ask and allow for many people to donate toward a larger goal.</td>
<td>Yes</td>
<td>No</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>Peer to Peer – Campaign allowing supporters to fundraise for a specific initiative.</td>
<td>Yes</td>
<td>Yes</td>
<td>Crowdrise + Everyday Hero</td>
<td></td>
</tr>
<tr>
<td>Do-It-Yourself (DIY) Peer to Peer – Campaign giving supporters the opportunity to fundraise year-round in a way of their choosing.</td>
<td>Yes</td>
<td>Yes</td>
<td>Facebook, Instagram, TikTok</td>
<td></td>
</tr>
<tr>
<td>Events (Ticketed or Registration) – Events that allow for a ticket purchase running up to the event.</td>
<td>Yes</td>
<td>Yes</td>
<td>Luminate Online</td>
<td></td>
</tr>
<tr>
<td>Events with Fundraising – Events with the ability for participants to fundraise leading up to the event.</td>
<td>Yes</td>
<td>Yes</td>
<td>Donorbox (Stripe)</td>
<td></td>
</tr>
<tr>
<td>Recurring/Monthly Giving and/or Membership – Campaign specifically geared toward acquiring monthly/sustained givers.</td>
<td>Yes</td>
<td>Yes</td>
<td>Luminate Online</td>
<td></td>
</tr>
</tbody>
</table>

The data in the Annual Online Revenue column is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.
40. Q&A: Can you please provide a breakdown of your recurring donors:

Number of Recurring Donors:
Monthly $ Amount:
Annual $ Amount:
Average Gift Size:
Frequencies (Monthly, Quarterly, Annually?)
  - How much of each
Origin Processor (if multiple, above details for each)
How many are international?

A: This data is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.

41. Q: Do your current donation pages dynamically translate to reflect the browser language of your donor’s home country?

A: No, they do not on Luminate. The only localization we have is on the International Carbon Calculator: https://footprint.conservation.org.

42. Q: Are you looking to transition entirely outside of the BB ecosystem or do you expect to continue using Raiser’s Edge as your CRM for the foreseeable future?

A: This RFP process is to identify the digital marketing and online fundraising platform that best meets the current needs and future ambitions reflected in the use cases in the RFP. This process is CRM platform agnostic and does not involve Raiser’s Edge, which meets our current business needs.

43. Q: Do you currently use or have an existing relationship with Omatic?

A: Yes, we do.

44. Q: What is your ideal data flow from the online fundraising and digital marketing platforms to your CRM?

A: Ideally, the recommended platform will allow only donor records to flow into Raiser’s Edge but not allow Raiser’s Edge data to flow into the recommended platform without controlled processes (i.e. not automatically).

45. Q: You mentioned potentially providing CI’s code repository to the implementation
partner. Can you kindly clarify the type of code (front-facing, for tracking purposes, etc.) and whether it’d be for donation forms, emails, or both?

A: All custom code developed for the purposes of meeting the use cases outlined in the RFP should live in CI’s repository and should include proper documentation of its usage.

46. Q: Will you be settling all donations in USD in a US bank account or is settlement needed for additional countries? If so, which additional countries and currencies would require settlement?

A: This isn’t an immediate requirement but we will likely need this functionality in the future if we want to accept local donations and maximize tax deductibility options for local donors, or if we are not legally allowed to accept local donations and to immediately transfer them to a U.S. bank account.

47. Q: Clarify the need for fundraisers to have admin access to account to create customized form receipts. Use case #s 13-17

A: We should have a template for donation receipt emails and confirmation pages that are consistently branded and centrally managed. This template should deploy as the default so that every donor will consistently and reliably see a donation confirmation page and receive an email receipt. Changes to the copy or layout of these templates should be automatically deployed across all instances of both. Many campaigns require updating donation form copy (e.g. mention a specific campaign or theme) and imagery (e.g. wildlife theme vs oceans) and, because the donation receipt emails and confirmation pages are a part of the donor pathway, both touchpoints should be customized to maintain consistency. This can be light changes, e.g. matching the imagery, or more specific, e.g. noting that an offset donation will be restricted to a CI-approved carbon project, but each touchpoint should be easy to update when new donation forms are created.

48. Q: Do we need to sign the code of ethics policy at this time or if we are the selected bidder?

A: When you submit your response to this proposal.

49. Q: What is the best way to provide the citations on ways to optimize CI’s current page - is there a format you’d like us to present this visually?

A: We are open to however respondents want to convey this information, but options include a bulleted list, annotated screenshots, or wireframes.

50. Q: Primary pain points with current fundraising and digital marketing solution?

A: The use cases outlined in our RFP were drafted to address our current requirements and future ambitions, both of which include the resolution of existing pain points. Please see RFP for additional details.

51. Q: What data from the marketing automation and fundraising platform does CI want integrated with RE?
A: We are open to recommendations based on best practices and which strategies will help us increase our email signup rate, donation conversion rate, donor retention rate and average donation without being burdensome to staff. This could include automated segmentation based on donor preferences learned from web or email analytics and / or insights from donor surveys.

52. Q: Does CI have the internal resources for building “custom configurations” or do they prefer partner recommendations in the proposal for custom work?
A: CI has internal resources, but we ask partners to perform custom configurations to ensure we are able to set up the marketing / fundraising ecosystem within our specified timeline.

53. Q: Assuming that CI is looking for partner recommendations for “custom configurations”, what level of detail regarding the SOW from the partners would CI like in the proposal?
A: Please provide the line item for each project deliverable and the estimated hours required to perform that task, e.g. “Set up branded email template – 25 hours.”

54. Q: Please describe the types of data that CI would like to collect with the donor surveys.
A: CI is open to recommendations based on prior experience and best practices. We would like to collect data that we can use to improve the donor experience. A few examples of questions could include “Which of the following environmental issues are most important to you?”, “What topics would you like to hear more about?”, “Which of the following CI priorities inspired you to give?” and “Why do you continue to support CI?”.

55. Q: Please provide the current amount spent on paid ads across google, LinkedIn and Facebook.
A: This data is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.

56. Q: Is CI willing to execute the vendor’s NDA’s for access to SOC II and other related non-publicly available security documentation?
A: This data is currently too sensitive to share publicly. Firms selected to the second round or “Demonstration Stage” will have access to this information upon signature and acceptance of a non-disclosure agreement.

57. Q: Will the vendors publicly available security documentation meet the requirement of completing CI’s security questionnaire or does CI require that all vendors complete their security documentation at this early stage of the RFP?
A: CI requires that all vendors complete the security documentation.

58. Q: How many contact records (unique email addresses) will CI be managing from the new platform? The opening section mentions +850K but the full number will be needed for pricing.

   A: If your platform has tiered pricing, please detail the thresholds for each tier and associated costs (and whether that’s billed monthly or annually).

59. Q: Is CI requesting a detailed SOW from the implementation partner as part of the proposal or simply stating the expected deliverables in Section 2?

   A: A detailed Scope of Work is optional. We will use your proposed solution and the implementation methodology to score your proposal, based on our confidence that it will meet the use cases outlined in the RFP. If awarded the project, your proposed solution and project methodology would form the basis for the scope of work in our final contract.

60. Q: Is CI requesting that the awarded software vendors and implementation partner sign CI’s Global Data Processing and Data Security Addendum – CI’s Confidentiality Agreement (NDA) – CI Policies for Non-Employee Acknowledgement or just the implementation partner?

   A: The implementation partner must sign the Global Data Processing and Data Security Addendum; depending on the legal/organizational structure of the implementation partner and need to exchange confidential information prior to the implementation services agreement, the CI NDA and CI Policies for Non-Employee Acknowledgement would have to be signed. The software vendor’s DPA will be assessed to ensure that it meets CI’s data processing and security requirements. If it is found inadequate for CI’s security and data processing needs, the DPA will either have to be revised or the software vendor will have to sign the Global Data Processing and Data Security Addendum. Depending on the need to exchange confidential information between the software vendor and CI, the CI NDA will have to be signed.

**TIMELINE:**

Q&A Shared with Vendors: December 2nd, 2020

Proposal Due Date: December 9th, 2020 (5:00pm est)