



Request for Proposals (RFP) *CRM and Related Systems Provider*

Organization Overview

World Renew, an agency of the Christian Reformed Church in North America (CRCNA), is a non-profit, international development and disaster response organization with home offices in Burlington, Ontario (Canada) and Grand Rapids, Michigan (U.S.A.).

In an increasingly crowded disaster response and development landscape, World Renew's communications and marketing, donor cultivation, and donor growth and retention need to be excellent to stand out from competitor non-profit organizations. This need is even more critical in light of stagnant or declining revenue from traditional sources.

Key Consultancy Objective

World Renew seeks to engage an experienced customer relationship management (CRM) software provider who works with mid-to-large scale non-profits with complex marketing and fundraising needs.

We require a comprehensive fundraising system that will meet our marketing, fundraising, reporting, and volunteer management needs across digital and traditional channels.

World Renew's CRM must capture all constituent activities and connect as seamlessly as possible to on-line giving, E-Commerce, peer-to-peer fundraising, and e-mail marketing.

The successful firm/consultant will demonstrate their ability to adapt to future changes in the digital marketing and fundraising realm as these areas will continue to grow and change rapidly in the coming years.

Consultancy Requirements

The independent consultant/firm will demonstrate proven expertise and success in providing CRM software for non-profit organizations, with experience in fundraising for non-profits in **both** the U.S.A. and Canada.

Please review and submit your proposal based on the detailed requirements outlined in the subsequent pages and send your submission on or before February 20, 2017 to Doreen Hoogvliets at dhoogvliets@worldrenew.net.

Thank you!

World Renew is not bound to accept any or all of the proposals received.

1. Goal Statement

World Renew requests proposals from CRM (Customer Relationship Management) providers who work with mid- to large- scale nonprofits with complex marketing and fundraising needs. We seek a comprehensive fundraising system that will meet our marketing, fundraising, reporting, and volunteer management needs across digital and traditional channels.

World Renew's CRM needs to capture all constituent activities and must connect as seamlessly as possible to on-line giving, E-Commerce, peer-to-peer fundraising, and e-mail marketing. The successful firm will also demonstrate their ability to adapt to change in the digital marketing and fundraising realm as these areas will continue to grow and change rapidly in the coming years.

World Renew expects;

- a) The donor experience on-line and off-line to be seamless and professional
- b) Donors will be able to join a segmented e-mail list, opting in to the frequency and type of communication they prefer
- c) Fundraising staff will have easy access to all donor engagement and giving history, ideally all found in one location
- d) The CRM to include both a strong volunteer management system and a 360 view of a donor/constituent that includes the history of volunteer activity and interest
- e) The CRM will include;
 - I. a sophisticated volunteer management component
 - II. one that allows volunteer managers the tools they need to mobilize our large cadre of volunteers
 - III. volunteer information that will be easily accessible to marketing and fundraising staff, ideally in the 360 degree view of the constituent profile

It is important to note that World Renew is a bi-national organization, with home offices in Canada and the U.S.A. World Renew Canada is based in Burlington, Ontario, with staffing to engage volunteers, donors, and churches and other groups in Canada. It is a separate non-profit charitable organization from the US World Renew organization which is based in Grand Rapids, Michigan and is similarly staffed. Both organizations much adhere to governmental privacy laws in their respective country of origin. It is important for World Renew to be able to maintain a CRM for its Canadian office, and an instance of the CRM for its US office. It will also be necessary to standardize reporting across the systems so teams can evaluate marketing, fundraising, engagement, and volunteer efforts consistently across the border.

2. Project Objectives

World Renew needs to upgrade its donor experience and its fundraising capabilities. Part of this improvement requires implementing high functioning, integrated systems for its marketing and fundraising efforts. While systems in and of themselves do not solve marketing or fundraising challenges, a high functioning, integrated system will lay the groundwork for World Renew to implement a strategy of integrated marketing and high quality, effective fundraising. Without the tools to implement the types of campaigns and strategies that key competitor relief and development organizations are using, World Renew will not be able to compete, let alone grow.

Key functions World Renew seeks in this project include:

1. System(s) that will collect all constituent data including giving history, interests, communication preferences (off-line and on-line), e-mail/postal mail addresses, contact history, prospecting, and volunteer engagement; ideally also social media engagement
2. System(s) that make this data easily accessible to finance, marketing, fundraising, and volunteer management staff, all in the same place, allowing team members to fine tune and improve its marketing and fundraising efforts for increased lead generation and revenue. This means that a constituent's volunteer activity and giving history and other engagement activities are all recorded within their record, so the 360 view of a constituent is possible
3. System(s) that create/lay the groundwork for an excellent constituent/donor experience off-line and on-line (engaging via direct mail, e-mail communications, on-line giving, E-Commerce /gift catalog, peer to peer fundraising, and social media)
4. System(s) that facilitate the implementation and fulfillment of a segmented digital marketing strategy (collecting constituent e-mail address and e-mail marketing opt in, interest areas and preferred communication methods all in one place together with donor giving history)
5. System(s) that either are simply one integrated system, or multiple systems that are truly integrated, thereby preventing data damage through the push/pull between data storage locations
6. System(s) that maintain donor privacy and confidentiality when adding information provided by them to their constituent record (for example their e-mail address), adhering to national privacy laws in the US and Canada. While the data needs to be private, World Renew does need to share address changes, deaths and other contact and household changes it receives with fellow CRCNA agencies. As a denominational ministry it is important that the CRCNA constituent experience is simple across different agencies, e.g. if Susan Smith provides a new address to World Renew we need to create a standard process to share that update with the other CRCNA offices and agencies that currently share one CRM. Likewise, if CRCNA receives an update, they will need to provide that update to World Renew so that our records are current without the donor needing to provide an update to both World Renew and the other CRCNA offices
7. System(s) that allows volunteer managers to track individual and volunteer team activities, hours provided, skills available, among other standard volunteer management data

Indicators of a Successful Implementation: No system, or integrated systems, will fix all of the challenges facing non-profit fundraisers. Many desired strategies require both a high quality system and staff members trained to implement particular tactics. Ultimately we expect that the implementation of a new system(s) will facilitate increased revenue. By utilizing new fundraising tools available in the new system(s), marketing and fundraising staff will also be better equipped to retain new and current donors, both one-time and recurring, and therefore raise more revenue.

That said, World Renew expects the system(s) to contribute to our success, with the following indicators demonstrating the degree to which we've achieved our system change objectives:

- Overall goal – increased revenue
- Decreased staff time for retrieving essential information out of database
- Increased diversity in donors
- Increased number of donors engaging with us on-line
- Increased number of deeper relationships
- Increased quality of donor and constituent digital experience as evidenced by:
 - Greater ease in signing in and making donations
 - Speedier gift acknowledgements and receipts specific to donations
 - Ability of donors to set up recurring credit card and/or ACH/EFT donations
 - Easier process for donors to update their account information if necessary.
 - Reduction of errors to donors will **not** experience errors with their on-line giving (no duplicate or triplicate gift processing).
 - Ability of donors to give within their country of residence. Easier process for staff to update constituent information and refund donations as needed. An example of this is that staff must have the ability to only update an expiration date (if that is the only item that has changed) without having to re-enter the entire credit card information.

In addition to these individual donor management items, the new system must also achieve these metrics:

- 1) **Accessible donor, church/group and volunteer information** -- We expect that a new system(s) will make detailed donor, church/groups, and volunteer information easily accessible to volunteer management, marketing, and fundraising staff for increased constituent engagement, contacts, e-mail marketing, and fundraising. Gift summaries, volunteer history, ministry interests, communications preferences, e-mail marketing opt-ins, prospecting, and more critical marketing and fundraising functions will be possible.
- 2) **Increased skills in World Renew staff involved in marketing, fundraising, and volunteer management staff members who are systems users, having received thorough training from the system(s) provider.** World Renew is open to recommendations on how best to equip staff to get the data they need out of the CRM, whether that means one user is highly skilled and the rest of the team knows how to pull basic information and update reports, or if multiple staff members are trained in multiple functions, or a different arrangement. Regardless of the initial training approach, World Renew expects the CRM provider to continue to provide any necessary training in an on-

going basis as new features emerge. As part of the initial training/introductory period World Renew also expects assistance in the development of standard reports for marketing, volunteer management, groups engagement, and fundraising. It will also be necessary for World Renew staff members to be in direct contact with system(s) customer support so that system issues are resolved promptly.

- 3) **Excellent integration of on-line/off-line/social media systems** -- Information will either flow freely within one system with multiple components for all on-line and off-line needs; or if multiple systems are utilized, they will be well integrated (through APIs, ideally) providing World Renew with a 360 degree view of constituents.
- 4) **Improved automation of e-mail marketing and integration with donation off-line system** -- As constituents engage with World Renew, they will be able to choose what communications channels they want to subscribe to, and automated marketing will flow out to these segments. Communication preferences, interests, and on-line giving information will flow into the CRM for ease of analysis.
- 5) **New system(s) are able to accommodate all types of gifts received, recorded, and analyzed** --This includes soft credits, gifts from foundations and estates, one-time gifts, recurring monthly credit card and EFT donations, peer-to-peer fundraising support, etc.
- 6) **Improved organization of constituent records for personalized marketing and fundraising** -- This means that interests and donations will be assigned at the individual/contact level instead of the household level. Businesses will also be classified appropriately for ease of marketing and fundraising.
- 7) **Adherence to privacy laws and policies** as facilitated by new system(s) means of organizing information and storing preferences. In Canada and the US, we must be able to comply with the requirement of American and Canadian privacy laws.

For a proposal to be successful, it must also:

- Include the cost of testing the integration of all systems with the CRM as we expect integration testing to be done before going live.
- Specific assurance that it is possible to use multiple merchant accounts and payment gateway(s) to handle US and Canadian draws (to meet CRA and IRS requirements).

Time Frame for Achieving Improvements:

World Renew expects the new system(s) implementation to be six months or less, being completed by **August 31, 2017**. During this time the implementing partner will also test the system(s) and their integration with each other. Affected World Renew staff will also be thoroughly trained so they are well equipped to use the new system(s). In the following 6-18 month period, World Renew will begin to see significant results from implementing a sophisticated, integrated system, which will help it grow and acquire new donors in a highly competitive relief and development non-profit sector.

If the implementation begins on schedule and looks as if it will not meet the August 31, 2017 deadline, the implementation process will be halted by September 10 and begun again in February 2018, allowing the critical fundraising year end season to commence without a system change in process. World Renew has been through that in Oct - Dec 2014 and does not wish to repeat the experience.

2.2 Technical Criteria

CRCNA IT (Information Technology) values reliable, highly available, secure systems. Cloud or SaaS implementations are preferred over on-premise systems.

The data collected and stored in this system will need to be pushed into Microsoft Dynamics Great Plains general ledger system. Vendors will provide information as to how others are doing this, what they have set up, or any other suggestions for this.

Security is a priority for this data. As mentioned above, since World Renew is a bi-national organization. Vendors will need to demonstrate how their product complies with related Canadian and American privacy legislation and regulations of the Canadian Revenue Agency and the Internal Revenue Service. More details can be provided about these regulations if needed.

Ongoing support and improvements are always needed. Vendors will describe each of the following:

- a) What are their normal release (upgrade) and patching cycles
- b) Is there an option for a sandbox (development/testing) database that contains a mirror of the data in production
- c) How do they want to receive support requests (e.g. through a single point person in World Renew, or from any system user in the organization) and what is required to make this possible--example--Administrative login for the system to be used by the vendor
- d) If additional products by 3rd parties are part of the proposal, include a description of how this impacts support

2.3 Projected Timetable

	Event	Completion Date
1	Receive proposals	Feb/20/2017
2	Vendor review and selection	Feb/27/2017
3	Project kickoff with vendor	Mar/3/2017
4	Go-live, testing complete, staff trained	Aug/31/2017
5	Close project with vendor or move to support/maintenance status	Nov/30/2017
6	Evaluate success relative to initial project goals	Feb/1/2018

3. Constraints and Risks

3.1 Time constraints

Implementation will need to begin quickly after the proposal is approved and a contract is signed. World Renew requires that the system be **fully functional before the fall/year end fundraising season of 2017** as that time brings in more than 30% of our annual revenue. This is particularly true for on-line giving platforms. The successful **firm awarded the contract** must meet an **August 31, 2017** implementation deadline that includes thorough staff training and all testing completed.

Please identify in your proposal how you will make this a priority within your portfolio **to meet the August 31, 2017 deadline.**

3.2 Budget

Indicate in your proposal all costs related to this project. If the system you propose does not include all functions specified above (e-mail marketing, on-line giving, E-Commerce, peer-to-peer fundraising, volunteer management, etc.), include all costs associated with implementing and integrating these add on functions. Also include the cost of testing the integration of all systems with the CRM as we expect integration testing to be done before going live. One-time costs and recurring costs need to be identified as such. Indicate clearly in your proposal if this is a quote or if it is an estimate. When you present the proposal to our project sponsors be certain to include 20% of the one-time costs PLUS add 20% to the total for being able to deal with the unexpected issues or opportunities that will present themselves, or clearly specify how unexpected expenses will be addressed when they arise.

3.3 Context

World Renew is a binational organization and as such we have constituents and donors in Canada and the US, along with a few scattered around the world. We expect that we may need two separate system(s) to manage donations in Canada, and in the U.S.A. As such, we'll need reporting for finance, volunteer management, fundraising, and marketing set up for each/per country and binational analysis. Given that World Renew has staff in the U.S.A. and Canada, multiple staff members in each office will be system users. Currently, members from all teams are involved in our system.

World Renew is an agency of the Christian Reformed Church. As such, our gift processing and information technologies are managed by the CRC's Advancement Services and IT departments. When it's time to implement the new system(s) it'll be important to coordinate work with both of these departments.

World Renew, like most non-profits, have a way of doing things that may be unique to the organization whether by necessity or simply by the evolution of the process over time. World Renew expects the implementation process to include open dialogue between implementing partners, system provider, and World Renew staff. Such open and regular communication will help identify opportunities for improved efficiencies in World Renew's systems operations, among other things.

The proposed schedule may be compressed compared to a typical system implementation. The **August 31 implementation date is required** in order to provide adjustment time for staff before fall/year end fundraising begins.

Please provide information regarding any potential issues or risks that you see related to this project.

3.4 Risks

The biggest risk factor from World Renew's perspective is the timing of the implementation. **It is critical for the implementation to be completed by August 31, 2017.**

Additional risks include:

1. Current data structure and the potential need to make modifications (or decisions related to data structure) as part of the data import process.
2. The diversity of World Renew stakeholders that need to be included in this process and their availability during this time:
 - a) Canadian and US locations
 - b) Job functions
 - c) Multiple decision makers due to the structure of World Renew (though this could change as part of a current fundraising process evaluation)

Vendors are asked to identify their risk factors (timing, solution set limitations, functionality that is needed but is still in the development pipeline, etc.)

4. Communication

4.1 Communication Plan and Tools

World Renew expects regular communication with designated World Renew staff member(s), at minimal weekly status updates regarding project progress. As unexpected delays and/or extra expenses arise, World Renew staff should be informed immediately.

Regular communication must continue throughout the life of the contract

As such, consultant/firm must include in their proposal how they intend to keep World Renew informed on project progress including what collaborative tools will be used, how frequently meetings will occur, what staff functions from World Renew should be represented in these meetings, and who will write and distribute the weekly status reports.