< ORGANIZATION LOGO >

ORGANIZATION NAME

Request for Proposal

The <organization name>, located at <organization physical address>, will receive proposals for a comprehensive, hosted, and <cloud-based or installed> Constituent Relationship Management system until <deadline day, date, time>. Proposals should be mailed or transmitted as a PDF to:

Name of organization representative
Title of organization representative
Name of organization
Mailing address of organization
Email address of organization representative

The award will be made <briefly describe the who, when and how: ex., at the regularly scheduled meeting of the ABC board of directors on January 2, 2022, and then awarded administratively>.

For administrative or additional specification information, contact:

Organization rep 1: Name, title, phone, email address

OR

Organization rep 2: Name, title, phone, email address

The <organization name> reserves the right to accept or reject any proposal or any part thereof or any combination of proposals and to waive any or all formalities.

<Organization logo>

ORGANIZATION NAME

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<Organization Name>

Background & Current Processes

The Organization ("alternative organization name") is a 501(c)(3) organization based in City, State. Briefly describe the organization: purpose, services, budget.

The Organization currently <note the existing database service: ex., installed CRM to manage approximately 3,500 constituent records, communications, and transactions related to: one-time and multi-year donations, gift pledges, registration for its events, a multi-level membership program, rental services, and merchandise>.

The Organization currently uses <describe the types of equipment, functions and processes of the existing system:

EXAMPLE:

The organization uses a mix of Windows-based desktop and laptop computers as well as a Samsung Galaxy E tablet for onsite sales of event tickets. Most data entries into the CRM, including contact information and financial transactions, are made manually by staff. Online entries are made by constituents through a shopping cart that links the organization website to the CRM and/or embeddable DIY pages related to:

- Donations
- E-newsletter subscriptions
- Membership payments
- Merchandise
- Registration for free events
- Services payments
- Ticket purchases

Staff members enter credit card transactions for processing through a single payment processor. Staff members then transfer transaction reports from the payment processing reports into QuickBooks Online.

Standard Instructions to Respondents

These instructions and specifications are prepared for your review and use. Any alterations to the specifications may result in disqualification from being considered for award on this bid.

Proposals that contain any omission, erasures, or contain additions of items not called for in the proposal documents, or that contain irregularities of any kind, may or may not be considered. All signatures should be in writing, in ink or electronically.

Once submitted, Respondents submitting proposals shall not withdraw or cancel such proposals. Proposals will be held by the Organization until all proposals submitted shall have been canvassed and award of contract made and signed.

The Organization is exempt from State of Texas Sales Tax and a Tax Exemption Certificate shall be furnished by the Organization to the successful Respondent upon request.

Deviations from specifications and alternate proposals must be clearly shown with complete information attached to the proposal. They may or may not be considered.

ELIGIBLE RESPONDENTS: Respondents are limited to those persons or firms qualified and engaged in a full-time business and which can assume liabilities for any performance or warranty service required.

COMPLETION OF FORMS: Each proposal should be submitted on the attached form(s) only. Respondent should fill in all information blanks. Failure to comply may be cause for rejection.

ACCOUNTS LISTING: Each Respondent should enclose an Accounts Listing, containing a minimum of five current clients where the Respondent has supplied the same or similar goods or services. These client references should pertain to product design, operation, and support. These references must reflect a record of excellent service and professionalism.

EXCEPTIONS TO SPECIFICATIONS: If exceptions are taken which deviate from the specifications, the Respondent must include a clearly marked statement indicating the exception. If an alternate is proposed its merits should be documented and described. Any assumptions made during the preparation of this proposal must be listed on a separate page and indicated as such.

ITEMS PROPOSED SEPARATELY: Any required additional items, including software, hardware, or payment processor, to operate/support the CRM must be listed, described, and priced separately on the Proposal Pricing Form by item. The Respondent must describe the merits of each required additional item for proposal evaluation. The Organization reserves the right to purchase, if applicable, recommended hardware from the most economical source.

PROPOSAL BINDING: All proposed terms and prices shall be binding for 60 calendar days after the submission deadline. The provisions of the proposal responses shall be considered part of any contract and shall control in the event of any conflicts with any other provisions of the contract, notwithstanding any provisions in the contract to the contrary.

PROPOSAL SUBMISSION: All material submitted by the Respondent as part of the response shall become the property of the Organization. The Organization reserves the right to request, at its discretion, any additional information necessary for clarifying or supplementing the proposal as submitted. Failure to supply any information requested in a timely manner is cause for rejection of the proposal as noncompliance.

SUBMITTAL OF FORMS: Proposals may be mailed, hand delivered, or emailed. **LATE PROPOSALS WILL NOT BE ACCEPTED!**

Mailing/Hand Delivery Address:	**Email:**
Organization ATTN: Organization Contact Organization mailing address	Organization contact's email address

PROPOSED SCHEDULE

- The deadline to submit proposals is day, date, time.
- Proposals will be evaluated from date range.
- Demonstrations by selected finalists will be held online date range.
- Selection of vendor and contract negotiation will be held no later than date.

VENDOR QUESTIONS: Questions regarding this request for proposal will be handled promptly and as directly as possible. If the question requires only clarification of instructions, it will be handled verbally. If any questions result in a change or addition to the specifications, the change or addition will be forwarded to all vendors, but no later than 72 hours before opening of the proposals.

EVALUATION CRITERIA: In order to receive consideration, responses must address all aspects of the specifications. The following general criteria will be used to evaluate the responses:

- Compatibility with other software used by the organization
- Software packages available now and enhancements planned
- Vendor's ability to support the organization's CRM needs
- Total cost which considers both initial acquisition and ongoing operating cost
- Results of reference checks
- Level, quality and type of client training and technical assistance provided
- Upward compatibility for future growth
- Ease of use and operation of the system
- Speed and efficiency of the software system
- Financial statements for the respondent
- Professionalism of project team

AWARD: The organization reserves the right to award the project based on what is most advantageous and best meets the evaluation criteria established in this RFP.

INDEMNITY: The organization will not accept a contract which contains any provision causing the organization to indemnify the vendor for any reason.

RETURN OF CONTRACTS: Awardee, upon receipt of contracts, must sign, notarize, and return to the organization within ten (10) days after receipt of contracts. Failure to comply could cause delay in payment of outstanding invoices unless the organization is notified of any contract discrepancies or reasons for delay.

DAMAGES: In the event implementation of the awarded CRM is not made within the stated time period (without acceptable reasons for delay and written consent from the Organization), the Organization reserves the right to award the project to the next available vendor and the awardee shall be liable for any damages, it being agreed that said sum is a fair and reasonable estimate of actual damages the Organization will incur. Vendor will not be held liable for failure to make delivery because of strikes, conscriptions of property, governmental regulations, acts of God, or any other causes beyond its control, provided an extension of time is obtained from the Organization.

CONFLICTS: In the event of conflicts between the written proposal and information obtained verbally, the vendor is specifically advised that the written proposal will prevail in the determination of the successful respondent.

VENDOR CONTACT: If the vendor representative and/or contact for the Organization on this contract changes during the contract period, vendor must notify the Organization in writing within two weeks of the change.

VENDOR RESPONSIBILITY: It is the vendor's responsibility to provide information on all necessary software, devices, and if applicable, hardware, to make the proposed system operational, regardless of direct mention in this document.

TRANSFER OF SERVICES: The services to be performed by the vendor shall not be assigned, sublet, or transferred without the prior written approval of the Organization, nor shall the vendor assign any money due or to become due to the vendor under any contract entered with the Organization without prior written approval of the Organization.

FINANCIAL STATEMENT: The Organization reserves the right to have the vendor provide financial statements reflecting the financial position of the company for the last two fiscal years and the most current year to date. The vendor must be a financially healthy institution capable of conducting business throughout the contract period.

WARRANTY/MAINTENANCE: The vendor shall be responsible for maintaining its cloud-based system throughout the contract period. Maintenance shall cover all new releases and updates and correction of defects in the system as well as technical assistance in the identification and diagnosis of problems.

INVOICING: The Organization operates on a purchase order basis. Please do not perform any services without obtaining a purchase order number. All invoices must reference a purchase order number; must be self-explanatory as to the charges for services and/or materials/equipment; and must reflect contract pricing. The Organization is a 501(c) (3) and can provide a Texas Sales Tax Exemption Form. Invoices are to be sent to the Organization, ATTN: Organization contact name and address.

PAYMENT: Payment will not be processed until the Organization approves successful and complete access to the CRM system and accepts functionality of the CRM. All amounts are due 30 days from receipt of the invoice.

CANCELLATION STATEMENT: The contract is subject to cancellation upon thirty days written notice by the Organization without cause.

DOCUMENTATION: The proposed system shall include complete documentation for all products. The documentation shall include the following manuals, print or online, at a minimum:

- Reference guides explaining each function and command.
- User guides containing procedures for using all system commands and functions.
- Technical documentation describing backup and recovery methods and procedures.
- Updated manuals with each new release of the software.
- Users shall have the right to produce an unlimited number of copies of all documentation.

IMPLEMENTATION: Pre-implementation meetings must start within twenty (20) days from the date of the official contract coming into force. The proposal should address the following:

- **Data Migration:** The vendor will provide a data migration/conversion program for the conversion of the Organization's current data into the new system. This program must ensure records and related data are not lost or compromised in the transfer. The proposal should address the vendor's typical conversion approach.
- **Post-Migration Operation:** The vendor will be responsible for insuring the CRM functions per the specifications. The Organization shall have thirty (30) days, commencing upon the completion of data migration, to test the CRM for substantial compliance with the specifications. The Organization shall notify the vendor of any failure of the CRM to comply with such specifications. Upon receipt of the notice, the vendor shall use its best efforts to correct the failure within five (5) days.
- **Post-Conversion Support:** The vendor will provide phone/email support during the first two weeks after conversion and/or until all operation problems are resolved to the Organization's satisfaction.

The vendor shall attach a proposed time schedule for implementation. The schedule should provide a complete implementation as soon as practical, with minimum disruption of the Organization's operations. The Organization reserves the right to negotiate changes in the schedule prior to entering into any contractual agreements.

TRAINING: The vendor will provide a detailed description of training available in the response. This will include training for all users of the system, including system administrator, end user operators, and others as necessary. The vendor will provide a recommended training plan to include estimated timing and outline vendor responsibilities and the Organization's responsibilities for training.

Purpose

The Organization requests proposals from qualified firms for the purpose of subscribing to a <brief description of desired system: ex., comprehensive cloud-based Constituent Relationship Management system>. The successful company will have experience implementing similar systems in similar venues or facilities as well as meeting and/or exceeding the requirements set forth in this RFP. This requires a thorough understanding of the Organization's existing operations and how the proposed system will interact with them. The Organization requires a smooth, seamless transfer from its current system and technology to a more effective, efficient, flexible, and user-friendly CRM system for improved operations.

A paragraph describing why the organization is seeking a new system and how it plans to use it. Increased programming? Facility expansion? Growing donor base? New marketing initiatives? Enhanced security? Improved productivity?

A paragraph outlining which area(s) of the organization the proposed CRM must address: ex. development/fundraising, marketing, ticketing, membership, and general departmental database management.

Note if training and support are key considerations during evaluation of the proposed system. If the system requires a specific payment processor, a description and all associated fees must be included on the Proposal Pricing Form.

Finally, include what are the priorities for vetting proposed systems. Meeting organization's requirements? Price? Compatibility with existing software? User friendliness?

Sample Specifications

The Organization will consider proposals whose systems provide the functionalities listed below:

DONATION MANAGEMENT	
Function	**Required Functionality**
Gift Records	• Quick/Bulk entry • Import gifts from spreadsheet • Fund/campaign/appeal tracking • Soft Credits • Notes • Attach document to gift record • Assign/track premiums
Pledges	• Create payment schedule • Customize payment schedule • Prompt all open pledges • Add credit card to pledge • Auto-remind donor of upcoming pledge
Recurring Gifts	• Automatically run report on expiring credit cards • Auto-process recurring payments
Online Donations	• Online donation forms • Online donations can be automatically added to database • Allow donors to cover processing fees • Personalized giving selections
Other Gift Types	• Honor/Tribute gifts • In-kind gifts • Gifts of stock
CONSTITUENT MANAGEMENT	
Contact Records	• Track multiple addresses, including seasonal addresses • Track communication preferences • Do Not Contact/Deceased • Track relationships • Automatic NCOA updates • Add social media profile links • Track donor source
Householding	• Create household records with giving roll-ups • Use household information for mailings • Household totals show on individual record • Track household salutations

	• Auto-soft credits other individuals in households based on relationship
Online Contact Forms	• Collect contact information online • Online contact forms automatically update records
Interactions	• View all interactions on constituent profile • Filter interactions by type • Log offline interactions • Store system-generated letters and emails • Add emails sent outside the system to constituent records
Groups/Tagging	• Add tags to constituent records • Add constituents to static and dynamic groups
Donor Research	• Prospect ratings with wealth screening tool
Duplicate Management	• Automatic duplicate checking on import/record creation • Duplicate record merges/deletions

PROSPECTING & PROPOSALS	
Workflow	• Assign status/priority to constituent
	• Assign staff contact
	• Manually assign/track tasks
Grant/Proposal Management	• Grant proposal management module with automatic workflow
	• Less desirable option: Track grant proposals using manual workflow
COMMUNICATIONS	
Letters	• Generate individual letters • Generate letters in batches • Create letter templates in system • System includes pre-built letter templates • Automatic batching of email and letter receipts • Integration with MS Word, Google Docs, Excel • Merge and print labels and envelopes • Allow downloadable file for labels and envelopes • One-click logging to constituent profile
Email Email – cont.	• Send individual and broadcast emails natively or via two-way integration with a third-party system • Log email performance metrics to constituent records • Upload externally created email templates to system • Pre-built email templates

	• Drag-and-drop email editing tool • Track unsubscribes
Content	• Merge fields
Text Messaging	• Native text messaging
Marketing (Email) Automation	• Triggered emails • Autoresponder emails
OTHER INTERACTIONS	
Events	• Online event registration and ticket sales • Event creation, registration/ticketing/attendance tracking native to system • Online system allows discount/custom pricing • Assign tables and seating • Generate name tags and/or table tents • Onsite check-in and payments • Ability to exchange tickets between series/seasons
Volunteer Management	• Track volunteer interests, skills, and hours • Online volunteer information forms
Membership	• Accept membership payments including renewal payments • Specify expiration dates • Multiple membership levels/types • Manage member benefits
Peer-to-Peer Fundraising	• Peer-to-peer fundraising via third-party integration OR with option to upgrade to peer-to-peer fundraising native to system
PAYMENTS & ACCOUNTING INTEGRATIONS	
Payment Processing	• Ability to choose from multiple payment processors
Transaction Exports/Accounting Integration	• Export transactions • Pre-built integration with one accounting system • Compatibility with most commonly used nonprofit accounting systems
Reconciliation	• Mark transaction records as reconciled with accounting and lock records

SEARCH, QUERIES & REPORTING	
Search	• Global search • Partial term matching
Queries	• Advanced query builder
Reports	• Standard reports • Custom report builder • Save reports • Export report data • Add graphs and charts to reports • Mark reports as favorite
Dashboards	• Pre-built dashboard • Add/remove widgets
OTHER INTEGRATIONS	
Integrations	• 5+ pre-built integrations
APIs	• Two-way API
SECURITY, CUSTOMIZATION & CONFIGURATION	
Security	• Password complexity requirements • Two-step or two-factor login verification • Ability to disable automatic logout after period of inactivity • Data encrypted at rest
Permissions	• Limited number of pre-set role-based permission sets
Customization	• Add numerous custom fields • Customize dropdown menu lists • Customize online (UI) form colors/header/layouts
Mobile Access	• Vendor provides mobile app with limited functionality

TRAINING & SUPPORT	
Training	• Initial training available during implementation • Role-specific training available • Online multi-stage training program • Online training videos • Regular training webinars
Support	• Unlimited phone and email support at no extra cost • Web chat support • User community or forum • In-system contextual help and tool tips

VENDOR PROFILE

Vendor Name: ____

Corporate Name *(if different from Vendor Name)*: ____

Business Unit Name *(if different from Vendor Name)*: ______________________________________

Application Software Name: ____

Annual Revenue: ____

Number of Employees: ____

Number of Years in Business: ____

Toll-Free Support Number: ____

Average Response Time in Hours: ____

Provide a brief description of your company, services offered, and what advantages your CRM system provides:

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PRINCIPAL CONTACTS

Please provide the name, title, address, phone number, and email address of the principal contact in your company for this project:

Name: ____

Title: ____

Address: ____

City: ____

State/Zip Code____

Phone Number: ____

Email Address: ____

Is the above specified person qualified to participate in any and all legal negotiations (i.e., contract negotiations, etc.)? If "No," please supply the following information for the person who has this authorization. _____ Yes _____ No

Name: ____

Title: ____

Address: ____

City: ____

State/Zip Code____

Phone Number: ____

Email Address: ____

ACCOUNTS LISTING

Please provide at least five current clients who vendor has supplied with the same or similar CRM as proposed (preferably nonprofit arts/cultural organizations).

Reference #1

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Reference #2

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Reference #3

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Reference #4

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

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Reference #5

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Reference #6

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Reference #7

Organization Name: ____

City, State: ____

Licensed Product: ____

Contact Name: ____

Tel. Number: ____

Email Address: ____

Respondent's Signature ____

Company Name ____

FOR MINORITY AND/OR WOMAN OWNED BUSINESS ENTERPRISES
(Complete only if applicable)

Minority and/or Woman Owned Business Enterprises are encouraged to participate in the Organization's process. The Organization will provide additional clarification of specifications, assistance with Proposal Forms, and further explanation of procedures to those who request it.

The Organization recognizes the certifications of both the State of Texas Statewide Procurement Division HUB Program and the North Central Texas Regional Certification Agency. All companies seeking information concerning certification are urged to contact:

Statewide Procurement Division
HUB Program
P.O. Box 13186, Austin TX 78711
(512) 463-5872
Email: StatewideHUBProgram@cpa.texas.gov
https://comptroller.texas.gov/purchasing/vendor/hub/

OR

North Central Texas Regional Certification Agency
2261 Brookhollow Plaza Dr, Ste. 300, Arlington TX 76006
(817) 640-0606
Email: mail@nctrca.org
http://www.nctrca.org

To be identified as a Qualified Minority and/or Woman Owned Business Enterprise in the Organization vendor database, please return this form, along with a copy of your certification, to the Organization. You should return these documents with this response. If you have already submitted this form and a copy of your certification to the Organization, it is not necessary to re-send. If you meet the criteria and are not currently certified, you may contact one of the above agencies for certification instructions. Once you are certified, return this form and a copy of your certification to: Organization name and mailing address.

COMPANY NAME: ____

REPRESENTATIVE: ____

ADDRESS: ____

CITY, STATE, ZIP: ____

TELEPHONE NO.: ____

EMAIL ADDRESS: ____

INDICATE ALL THAT APPLY:

______Minority Owned Business Enterprise
______Woman Owned Business Enterprise

Proposal Pricing Form

Description		One-Time Cost	Recurring Costs
Data Conversion			
	Based on current # of constituent records		
	Based on max. # of constituent records		
	Subtotal	$	$
Implementation			
	Based on current # of constituent records		
	Based on max. # of constituent records		
	Subtotal	$	$
Annual Subscription License			
	Based on minimum # of users		
	Per additional user		
	Subtotal	$	$
Payment Processor Fees (if applicable)			
	Percentage per transaction		
	Flat rate per transaction		
	Payment Gateway Fee		
	Batch fee		
	Early Termination Fee		
	PCI Compliance Fee		
	Equipment Lease Fee		
	Setup/Annual Fee		
	Other (specify)		
	Subtotal	$	$
Training			
	Related to CRM		
	Related to Other Requirements		
	Subtotal	$	$
Additional Costs Not Listed Above (list and include one-time and/or recurring amounts)			
	Subtotal	$	$
Total One-Year Costs		$	$
Total Two-Year Costs		$	$

Respondent's Signature ____

Company Name ____

Proposal Signature Page

The accompanying Forms & Documentation are hereby submitted as a Proposal in response to the Request for Proposal (RFP) issued by the Organization to acquire a subscription to <description of desired CRM system>. All information and statements are true, accurate, and binding representations of its intentions and commitments in responding to this RFP.

Company Name: ____

Contact: ____

Address: ____

City: ____

State/Zip Code____

Phone Number: ____

Email Address: ____

Respondent acknowledges receipt of the RFP dated <date>, and submits the attached proposal for this RFP to the Organization on the authority of the undersigned and, as dated below, who by signing confirms and pledges to abide by and be held to the requirements of the RFP and its resulting contract, to perform any tasks and deliver any documents required, and to execute a Contract with the Organization.

Authorized Agent of the Respondent:

Signature: ____

Printed Name: ____

Title: ____

Date: ____

PROPOSAL DUE DATE: Day, date, time