

Title: Request for Proposals #PG001 Planned Giving Marketing

RFP No.: #PG001

Clarifications

Distributed on: **June 27 2024**

General	
1. Do you have an incumbent and would they be participating in this RFP?	We do have an incumbent. Proposals for interested bidders are due July 12.
2. Could you let us know if you have a local preference or are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?	If the organization can legally solicit donations in all 50 states, we can accept and evaluate a proposal.
3. Could you let us know what the budget is for this work and what media budget would you have as well?	No, the budget will not be disclosed during the RFP process.
4. Do you have a CRM for the emailing that needs to be done?	Our CRM is Raiser's Edge. Our digital platform for email marketing is EveryAction. Emails will be produced and sent by our internal Digital Fundraising Team.
5. For the mailing do you have a relationship that can help facilitate this or would you like us to do this through USPS?	The bidder must be able to complete mail production on behalf of CI.
6. What would be the ideal term of the contract for this work?	The contract in this RFP is for 12 months. Ideally, if all goes well in the first year, we would be interested in a multi-year contract.
7. If the bidder's proposal will include modeling to select the appropriate recipients for both Mail and Email communications. Will CI be able to provide a mailable/emailable list to be modeled and selected from or a list of suppressions that should be applied or will the Bidder need to provide that data processing?	Yes, however, CI recently invested in modeling in 2022 and we have over 4,000 prospects that were identified through that. Data for mail lists will be produced internally.

<p>8. Will CI be able to provide the final mailfile in required layout for printing or will the bidder need to provide that data processing as part of the proposal?</p>	<p>CI will provide the final data files for mailing.</p>
<p>9. The RFP mentions that digital scope will include strategy, copy, and creative. To confirm, CI will be developing emails (html) and deploying emails in the ESP or will the bidder need to provide those services as part of the proposal?</p>	<p>CI will develop and deploy email marketing.</p>
<p>10. A year from now, when we reflect on a successful planned giving marketing partnership, what does success look like from CI's point of view?</p>	<p>Success looks like deploying planned giving marketing materials on time by our goal deadlines, meeting or exceeding adding 20 new Future of Life Society Members in FY25 and increasing the pipeline of prospects. Additionally, reporting on program success to continue to show that an increased investment is significant for our goals of building a pipeline and creating further opportunities for flexible funding.</p>
<p>11. What are the key elements to a vendor partner relationship that you value most?</p>	<p>The key elements that we value the most are communication, transparency, strategy and ability to pivot when something isn't going well. Proactive problem-solving and thinking outside the box to make suggestions for continual improvement of the program.</p>
<p>12. What organization(s) would you consider your top competitors in terms of fundraising?</p>	<p>At Conservation International we don't see other nonprofits as competitors because we believe in partnering to make the world a better place together.</p>
<p>13. Can you provide your current mass market communication calendar for annual and mid-level direct response?</p>	<p>In FY24, we mailed nine appeals, four acquisitions, and deployed 13 digital campaigns.</p> <p>Firms selected for the interview stage will have access to additional information upon signature and acceptance of a non-disclosure agreement.</p>
<p>14. Please share any recent planned giving prospect research or file screening you have conducted.</p>	<p>Prospect research is being done on a daily basis internally to identify individuals as planned giving prospects. CI recently invested in modeling in 2022 and we have over 4,000 prospects that were identified through that.</p>
<p>15. In terms of campaign execution for mailings, are you open to your planned giving vendor working with your existing direct response vendor instead of building out new infrastructure? We often find this most cost effective since the planned giving program is small.</p>	<p>Yes, we will consider this scenario with operational guidelines for partnership and oversight.</p>

<p>16. Do you have the capacity to deploy digital/email campaigns internally? Or are you looking for the vendor to deploy these campaigns?</p>	<p>CI will deploy digital campaigns.</p>
<p>17. Do you have an estimated expense budget range for the scope of work outlined? Or a 'not to exceed' amount?</p>	<p>This is a best value procurement and as such, we are not releasing budget parameters.</p>
<p>18. Since the growth of the planned giving program is highly dependent on the membership pipeline, can you please tell us how many members CI has who have given in the past 0-18 months?</p>	<p>In the last 18 months, just under 35,000 donors managed by the Annual Giving Team have made gifts. In FY24, active Future of Life Society members made 225 gifts and contributed over \$200,000 in annual revenue.</p>
<p>19. Is CI currently investing in membership file growth through acquisition? Do you anticipate that to continue over the next three to five years/</p>	<p>Yes, our acquisition program is currently limited to rental lists only due to our donor privacy policy. We do anticipate continuing to have an acquisition program.</p>
<p>20. What can you tell us about leadership's commitment to planned giving? Have C-Suite staff and Board members been asked to make planned gifts?</p>	<p>Leadership sees planned giving as an emerging opportunity for flexible funding and are interested in increased investment. Two Board members are Future of Life Society members and there are future plans to actively discuss with the rest of the Board and Leadership Council.</p>