



**Pathfinder International Request for Proposals for
Integrated Online Solutions**

January 26, 2011

Contents

A.	INTRODUCTION	4
B.	PROPOSAL REQUIREMENTS	ERROR! BOOKMARK NOT DEFINED.
C.	TIMELINE	5
D.	INTENT TO RESPOND	5
E.	QUESTION & ANSWERS.....	5
	Written questions:	5
	Online Q&A:	6
F.	SUBMITTING A RESPONSE.....	7
G.	MAJOR DELIVERABLES	7
H.	PROPOSAL REQUIREMENTS	ERROR! BOOKMARK NOT DEFINED.
I.	EVALUATION CRITERIA.....	8
J.	TERMS AND CONDITIONS	9
K.	DETAILED REQUIREMENTS	9
	1. <i>Web Content Management</i>	<i>10</i>
	1.1. <i>Constituent Experience</i>	<i>10</i>
	1.2. <i>Creating Web Content</i>	<i>10</i>
	1.3. <i>Information Architecture</i>	<i>11</i>
	1.4. <i>Collaboration Tools.....</i>	<i>12</i>
	1.5. <i>Core Technology</i>	<i>12</i>
	1.6. <i>Mobile optimization.....</i>	<i>13</i>
	1.7. <i>Add Ons/Other Features.....</i>	<i>13</i>
	2. <i>Email & SMS Marketing</i>	<i>14</i>
	2.1. <i>Email Creation</i>	<i>14</i>
	2.2. <i>Email Content</i>	<i>14</i>
	2.3. <i>SMS</i>	<i>14</i>
	2.4. <i>List Management.....</i>	<i>15</i>
	2.5. <i>Campaign Management.....</i>	<i>15</i>
	2.6. <i>Testing</i>	<i>16</i>
	2.7. <i>Miscellaneous</i>	<i>16</i>
	3. <i>Online Fundraising</i>	<i>17</i>

3.1.	<i>Online Giving Options</i>	17
3.2.	<i>Donor Experience</i>	18
3.3.	<i>Merchant Accounts</i>	18
3.4.	<i>Conducting eCommerce</i>	18
3.5.	<i>Fundraising events – online calendar and ticketing</i>	19
4.	<i>Advocacy</i>	19
4.1.	<i>Activist Experience</i>	20
4.2.	<i>Alert Creation</i>	20
4.3.	<i>Targeting the alert</i>	21
4.4.	<i>Vote Tracking</i>	21
4.5.	<i>Reporting</i>	21
5.	<i>Online Constituent Relationship Management</i>	22
5.1.	<i>Contact Management</i>	22
5.2.	<i>Exchanging data with back-end databases</i>	22
5.3.	<i>Enhancing Loyalty with Online Constituents</i>	23
5.4.	<i>Conducting Online Survey</i>	24
6.	<i>Technical Infrastructure</i>	24
6.1.	<i>Core Technology</i>	25
7.	<i>Security</i>	25
8.	<i>Scalability & Stability</i>	26
9.	<i>System Requirements and Standards</i>	26
10.	<i>Managing Special Events</i>	26
10.1.	<i>Online Event Registration</i>	26
11.	<i>The Volunteer Experience</i>	27
12.	<i>Deployment and Company Information</i>	27
12.1.	<i>Implementation Processes</i>	27
13.	<i>Corporate Information</i>	28
L.	SOLUTION PRICING	28

Introduction

Pathfinder International is a global leader in reproductive health. Our mission is to ensure that people everywhere have the right and opportunity to live a healthy reproductive life. Over the last few years, Pathfinder has expanded its web presence, placing emphasis on the power of the web to convey our message and enhance the constituent experience. Strong online communications are critical to reach wider audiences with our message, lower communication and administration costs, impact public policy, raise critical unrestricted funding, and move forward our mission of serving those in need.

Pathfinder seeks an online solution that is flexible, nimble, open and able to be modified to meet evolving and future needs.

Our strategic objectives include:

Mission Support

- Accurately, and comprehensively relay our mission and bring people into our website easily so that they can receive the information they need
- Provide access to training materials, publications and curricula for our projects and partner organizations
- Bolster an online unrestricted donor program for all levels of donors
- Better support mission by growing donation revenues; number of donors and donor value
- Increase donor/ member retention rates
- Enhance advocacy efforts to impact legislation and public policy

Stronger Relationships

- Expand outreach through email and a more dynamic website
- Develop relationships with website visitors
- Increase visitor interaction and loyalty
- Reduce data silos between various programs (online, offline, advocacy, etc)
- Integrate with social media outreach and promotion

Cost Savings

- Lower cost per touch for constituents through email and auto-responses
- Lower administrative costs through integrated/open platforms

Our present audience includes:

- **Technical audience** – Pathfinder has a range of visitors to our site seeking technical reproductive health information, whether curricula, research, or otherwise.
- **Funders** – This includes primarily government and institutional donors who visit our site looking for information about our services and programs.
- **Individual donors** – Although our individual donor base is small, we're looking to expand.

Our website receives about 71,000 page views a month from about 24,000 visitors. We currently have a useable housefile of about 25,000. Currently we have about 1,000 pages on our website. Our web content for our main site, project sites and some microsites is currently managed through Convio across several independent instances (including several microsites). We have two full time staff, as well as several peripherally involved staff, dedicated to managing it.

Our current capabilities are:

1. Donor database – (e.g. Blackbaud RE Version 7.1)
2. Email Marketing Tool – Convio
3. Advocacy Tool – Convio
4. Online Giving Tool – Convio
5. Web Content Management Tool – Convio
6. Social media presence -- Facebook, Twitter and YouTube
7. Blogging – currently have an unused Wordpress blog
8. Intranet – Microsoft SharePoint

A. Timeline

RFP published	: January 26 th 2011
Intent to respond	: February 1 st 2011
Written questions submitted	: February 7 th 2011
Answers provided to written questions	: February 11 th 2011
First Online Q&A session	: February 15 th 2011
Second Online Q&A session	: February 16 th 2011
Proposals due	: February 21 st , 2011

B. Intent to Respond

Please indicate your intent to respond via email to onlinerfp@pathfinder.org by 5pm US Eastern Time on February 1st 2011. Please include contact information.

C. Question & Answers

Questions will be answered in two ways:

Written questions:

Written questions must be submitted to onlinerfp@pathfinder.org by 5pm US Eastern time on Monday February 7th 2011. A summary of all questions and answers will be sent to each vendor that has indicated intent to respond by 5pm US Eastern time on Friday, February 11th 2011.

Online Q&A:

Two online Webex audio and web conferences will be held on:

Monday, February 14th at 2pm US Eastern time

To join the online meeting

1. Go to
<https://pathfind.webex.com/pathfind/j.php?ED=142963637&UID=1147865747&RT=MiMxMQ%3D%3D>
2. Enter your name and email address.
3. Enter the meeting password: (This meeting does not require a password.)
4. Click "Join Now".

To view in other time zones or languages, please click the link:
<https://pathfind.webex.com/pathfind/j.php?ED=142963637&UID=1147865747&ORT=MiMxMQ%3D%3D>

To join the teleconference only

Call-in toll-free number (Premiere): 1-888-619-1583 (US)
Call-in number (Premiere): 1-719-457-1414 (US)
Attendee access code: 603 710 6030

Tuesday, February 15th at 2pm US Eastern time

To join the online meeting (Now from iPhones too!)

1. Go to
<https://pathfind.webex.com/pathfind/j.php?ED=142964997&UID=1147871232&RT=MiMxMQ%3D%3D>
2. Enter your name and email address.
3. Enter the meeting password: (This meeting does not require a password.)
4. Click "Join Now".

To view in other time zones or languages, please click the link:
<https://pathfind.webex.com/pathfind/j.php?ED=142964997&UID=1147871232&ORT=MiMxMQ%3D%3D>

To join the teleconference only

Call-in toll-free number (Premiere): 1-888-619-1583 (US)
Call-in number (Premiere): 1-719-457-1414 (US)
Show global numbers:

<https://www.myrplus.com/cnums.asp?bwebid=8369444&ppc=6037106030&num=1888-619-1583>

Attendee access code: 603 710 6030

All vendor participants will be muted and questions accepted through the chat window of the Webex session. Pathfinder staff will be on hand to answer the questions live through the audio conference.

Please note that we will not accept contacts to the Communications, Information Systems or other departments at Pathfinder in person or by email or phone for additional information outside the defined address. Additional requests for contact not listed in this RFP will be counted as negative criteria during the evaluation.

For assistance solely related to joining the online meeting and audio conference, please contact:

Jaime-Alexis Fowler
Online Communications Manager
onlinerfp@pathfinder.org
617-924-7200 x204

D. Submitting a Response

Proposals should be submitted via email to:

Jaime-Alexis Fowler
Online Communications Manager
onlinerfp@pathfinder.org

Deadline for Submission is 11:00PM US Eastern Time, February 21st, 2010.

E. Major Deliverables

1. Deploy a fully integrated solution for web content management, email publishing and eCRM (online constituent relationship management) operations. Implement state-of-the-art eCRM and CMS tools for constituency building, advocacy and fundraising. Deploy tools to create new integrated websites or microsites as required, along with robust email capacity for daily and weekly news editions, and ad hoc campaign messages.

2. Migrate selected existing web content to the new platform.

3. Migrate and integrate our constituent data from existing online systems and offline sources to the new system's constituent management database. Integrate either with Raiser's Edge constituent management system or Serenic Navigator financial management system.

4. Provide training and strategic assistance in effectively utilizing these new tools to achieve our goals, particularly the eCRM features.

Pathfinder will be releasing a second RFP after the decision around web content management to:

1. Assist in the development of information architecture for the website.
2. Create design elements including design templates, images, and style sheets that can be rolled out across the site.

F. Proposal Requirements

Proposals must include the following information

1. A description of the vendor's background and qualifications, including:
 - Examples of similar work provided to other organizations with similar geographic reach
 - Description of team qualifications
 - Project management approach and capabilities
 - References or case studies. References will be required for final selection.
 - List of example sites built on the proffered solution, with emphasis on demonstrating innovative use of the solution's capabilities, variety of visual design, and user-driven experience customization.
2. A proposal including details of the vendor(s):
 - Systems and solution capabilities
 - Answers to the specific questions found in the detailed requirements section of this RFP
 - Project plan summary and development timeline
 - Implementation approach
 - Configuration options
 - Suggested training plan, and available training and certifications
 - Software release history (previous 3 years), including dates and release notes
 - Current software roadmap describing next 3 major release cycles. Pathfinder understands that software roadmaps evolve over time, and will not interpret presence of features on provided roadmaps as commitment to deliver those features.
 - Process by which new functionality is conceived, prioritized, scheduled and released. Please describe the process for customer input to future functionality.
 - Supporting user community history, meetings, conferences and current status.

Please note any requirements you are unable to meet with standard features or customization, suggesting alternatives or workarounds when appropriate (provide examples if possible). In cases where future releases of your solution or systems will allow you to meet currently unattainable requirements, please furnish specific

timeline and functional information that you could commit to in a service agreement.

3. A detailed cost proposal based on the requirements, with details and component and option cost breakdowns

G. Evaluation Criteria

Pathfinder will review and evaluate all proposals using its sole judgment and discretion. Evaluation criteria will include (in no particular order):

1. Completeness and quality of proposal in response to RFP criteria (25%)
2. Pricing (15%)
3. Reputation of provider/solution (20%)
4. Accessibility/openness of data/APIs (10%)
5. Client or company-driven community resources (system community) (5%)
6. Application history and programmability (15%)
7. Additional criteria (10%):
 - i. History-driven user experience
 - ii. User-driven online experience
 - iii. Cross-pollinating data
 - iv. Social media integration
 - v. Search features
 - vi. Document management
 - vii. Examples of innovative usage of proposed solutions, with emphasis on flexibility and cost effectiveness of solution
 - viii. Demonstrated willingness to adapt to evolving standards and technologies
 - ix. Near term and long term roadmap for future updates

H. Terms and Conditions

Pathfinder reserves the right to reject any and all proposals, in whole or in part and to cancel or amend the RFP at any time prior to the execution of a contract.

Pathfinder may respond to questions from vendors or provide additional information to vendors and is under no obligation to provide responses or information to other vendors.

All responses to this RFP and any other material submitted by the vendor in relation to this RFP will become the property of Pathfinder International.

I. Detailed Requirements

For each section below, please include details of your proposed solution capabilities beyond the direct questions asked. We strongly encourage additional forward-looking ideas and

thinking both in response to the questions asked below or derived from your strategic planning in the online communications area.

1. Web Content Management

Pathfinder International seeks to make its website more dynamic, personalized and easier to maintain. Our key requirements for website management are as follows:

1.1. Constituent Experience

- Can you display content items related to the item currently being read by a website visitor in a semi-automated or fully automated fashion?
- How can website visitors search for content? Can administrators customize the search experience? Does the solution support federated search, synonyms, categories, etc.? Does the solution support delegating tagging of content to administrative and/or user groups? Please describe search reporting capabilities as appropriate. Please provide examples of how results are returned, e.g., by date, by relevance, etc.
- Does the CMS support website content filtering by interests or other categories?
- Please describe the solution's ability to let users tailor their own online experience, for example by specifying areas of interest, interest in receiving alerts when content is updated, etc.
- Please describe cross-browser compatibility features for all user and administrative scenarios.

1.2. Creating Web Content

- Does your company provide website design services?
- Does your solution have an easy to use, HTML-optional system for managing website content, e.g., creation of new and modification of existing content?
- Does your solution allow for additional code (HTML or other) to be inserted within your WYSIWYG editor? Can you input code (e.g. embedded YouTube videos) without having to switch your view from WYSIWYG to HTML?
- Can the solution be administered without any HTML or code editing. If not, please describe scenarios where such may be needed.
- Do you provide a template based web page creation and management system with multiple templates and page layouts to enable flexible page design and layout?
- Can your solution categorize content items by topical areas and present articles to website visitors based on their profile and interests?
- Do you have an image "library" to enable upload and storage of high-resolution images for later re-use, including indexing/search system?
- Please describe any and all ways in which photographs can be displayed through your solution. Are there slideshow mechanism(s)?
- Do you provide the ability to manage/edit navigation without vendor intervention? Describe how the solution might accommodate the need to maintain different

navigation depending on context. Please provide examples of how this has been used. Please address primary, secondary and additional navigation as appropriate.

- Does the system allow for manually administered navigation, automatically generated navigation based on content, user history, or administered logic.
- Does the solution clean up inelegant and non-compliant HTML created by Microsoft Word and other editors?
- Describe versioning, archiving and rollback capabilities of the solution. Can you set publishing dates?
- Does the solution allow for server-side integration with other platforms and services? Detail as appropriate.
- Does the solution allow for client-driving server-side customization?-
- Please describe your capabilities for testing of web content changes from generation through editing and approval before publication. Can your system host/present multiple website graphical designs under one URL? Are frames of any sort ever required by the proposed solution?
- What kind of content library (or asset library) capabilities does your solution provide?
- Does your solution make it possible to automatically create alternate versions of content, for example printable, light-weight and mobile views of pages. Can custom alternate views be created by administrators using the CMS? Please provide detail for all content types. ?
- Can the CMS create and manage templates through administrative interface without vendor assistance? Can templates enforce consistency of some section(s) of templates while allowing content creators the ability customize some other section(s).

1.3. Information Architecture

- Does the CMS offer administrators the ability to modify and change architecture as site grows and changes without vendor assistance?
- Can administrators select different templates for each page from a stored list of templates?
- Can all content be copied, moved, etc? Describe any administrative impact of reorganizing content, e.g. will internal links be automatically corrected, will external links be automatically redirected, etc.
- What technical skill level is needed to edit site templates? Describe the process of doing so.
- Can administrators create and maintain additional websites such as mini campaign sites?
- Does your system have the capability for creating and publishing unique content types like news articles, job listing, resources, etc.?
- Can a system administrator search for news articles by author, publish date, key words and other variables?

- Can certain sections of the navigation be shown/hidden conditionally based on group membership or previous history?
- Can administrators create private sections for use as extranet/intranets? Please describe and provide examples of successful usage of such if applicable.
- Does the document/image management system support multi-level folder management?

1.4. Collaboration Tools

- Does your system provide workflow approval for content publishing (e.g., create, review, approve and publish)? Are there any limitations? Please describe in detail any workflow capabilities.
- Does your system allow administrators to schedule content to be published in the future at an exact date/time?
- Can your system handle multiple roles (e.g., super administrator, administrator with creation rights only, constituent, team member, registered user, etc.?) To what extent can these roles be customized without vendor support? Please describe in detail the ability to granularly customize administrative and user roles.
- Describe how the system allows for delegation of content ownership by category, campaign, content type, etc?
- Does your system have the capability to do page versioning and archiving?
- What type of content auditing and reporting capabilities does your company provide?
- What kind of application security options and policies does your company provide for the different roles involved in creating and publishing web content?
- Does your system integrate with Active Directory? Describe integration with external databases.
- Describe any additional collaboration mechanisms, e.g. discussion forums, OneNote integration, etc.

1.5. Core Technology

- What kind of web statistics or reporting does your company provide?
- Do you support integration with external web statistics systems? Which ones do you have experience with or out-of-the-box configurations?
- How does your solution ensure its ability to allow search engine crawling? Please provide examples including practices around URLs, CSS, HTML, etc.
- Does your solution allow for the creation of multi-lingual content? Which ones? Is the administrative interface multi-lingual?
- Does your solution allow for different character encodings such as Unicode? Which ones?
- Does the solution include any custom or integrated macro or scripting capabilities?

- Does the solution have the ability to integrate 3rd-party or client-created extensions. Describe as appropriate.
- Is it possible to customize or extend core system functionality? Describe as appropriate.
- Can the solution be used to create multiple websites? Describe the administrative process. Can it be done without using professional services? Describe site administration delegation, any additional costs if appropriate, etc.
- Describe the solution's ability to manage DNS, additional and sub- domains, etc.

1.6. Mobile optimization

Please outline how your solution supports, your experience with, and your future planning for:

- Different types of Smartphones
- Text phones
- Tablets
- Android and iPhone apps

1.7. Add Ons/Other Features

Please outline whether / how your CMS supports:

- Multi-media hosting/support options
- User contributed content
- Blogging
- Podcasts
- eCard functionality
- RSS Syndication of content
- Integration with social media, especially as applies to fundraising campaign management.
- Video hosting/video content/video broadcasting/video editing/ video tagging,etc.
- Applicant tracking system for employment opportunities
- Learning Management System
- Tracking of user engagement (e.g. what section do they visit the most, where do they hover on given pages, reporting on visit pathways, reporting per-page on referring pages, etc)

2. Email & SMS Marketing

Pathfinder seeks to communicate more effectively with its supporters through email and, as technology evolves, through mobile devices. Please address the following questions that relate to our key requirements for email marketing:

2.1. Email Creation

- What is the email creation process?
- Do you provide an HTML optional (WYSIWYG) editor for creating emails?
- Can users specify they want only to receive text emails? Can your system auto-populate plain text emails based on the text entered in the WYSIWYG editor? Describe process of creating as appropriate.
- What is the average time required for sending out an email campaign?
- Does your solution impose any limits on the user's ability to insert/edit text, change images, select font sizes and types, and select colors?
- Can your solution enable the administrator to create templates and limit users from editing only specific sections of these templates?
- Does your solution provide templates for creating and sending emails?
- Describe the process of creating email templates. Does your solution provide the client with the ability to see the message as the recipient will, regardless of format or email provider?
- Does your system allow for testing and verification in different email providers?
- Describe the solution's ability to monitor and manage email efficacy.
- Does the solution provide a rate-control mechanism to allow users to select the type and quantity of communications they receive?

2.2. Email Content

- Can your solution allow dynamic content to be part of an email message?
- How does your solution allow for personalization in email?
- What formats does your solution allow email to go out in?
- Does your solution allow for audio-video streaming, flash, etc. within an email? If not, what are some examples of how your clients are using multimedia content in emails in innovative and effective ways?

2.3. SMS

- Can your solution send SMS messages?

- Can your solution receive SMS responses and act on them?
- Can the solution do polling/surveys by SMS?
- Can the solution accept donations by SMS?
- Can the solution track to any extent the geographic origin of SMS messages used in any of the above. Describe as appropriate.
- If your solution does not have mobile capabilities, but is planning to include them in the future, please describe as appropriate either how you integrate with other platforms or how, when and on what timeframe you plan to roll it out.

2.4. List Management

- Does your solution provide list import/export capabilities?
- Does your solution provide the ability to FTP data between a back-end database and its database? If so, describe in detail including any associated watch- or timer-processes.
- Does your solution have the ability to merge/purge across lists?
- What kind of list hygiene capabilities can you provide?
- Does your solution allow for segmenting, or segmenting within a list?
- If a subscriber qualifies for more than one version of an email, what de-duping capabilities are available?
- Does your solution have the ability to create and manage multiple suppression lists? If so, describe how all areas of the solution interact with and use lists.
- Detail any querying interface.
- How are constituents segmented within the housefile? By email? Name? And how is deduping done? Can users have multiple emails on record? And if so, how does that deduping process work?
- Please describe what solutions exist for lists of potential constituents, whom the organization would like to email, but who have not formally opted in for email communications. Is it possible to email segmented lists without adding them as constituents to the system?

2.5. Campaign Management

- Describe in detail how autoresponder emails are managed. What kind of event-triggered emails does your company support? Does your solution support sequence email marketing (e.g., a “welcome series”)?
- Does your solution have the ability to suspend a sequenced campaign to change content of downstream emails?

- Does your solution have the ability to instantly unsubscribe end users from a sequenced campaign? Describe this user experience in detail.
- Does your solution have the ability to create custom unsubscribe landing pages / forms without access to support services?
- Does your solution provide the ability to send emails on behalf of an individual (e.g., from Pathfinder's president or VP)?
- Does your solution provide the ability to track the source of the email sign up back to the form and/or promotion? Describe any additional functionality on this topic. Describe reporting around this.
- Describe the solution's ability to integrate branding across various content types on a per-campaign basis, e.g. sites, pages, forms, emails, etc.
- Does the solution enable the measuring of ROI for email campaigns?

2.6. Testing

- Does your solution allow for testing of email campaigns with small lists or individuals?
- Detail the solution's ability to monitor and maximize the email efficacy, including but not limited to the ability to split A/B test on opens, per-link clicks, etc.
- Does your solution allow for rolling up test emails and comparing all test emails against previous campaigns?
- Does your solution allow for testing of all links without launching a campaign?
- Does your solution ensure all personalization codes are valid and have substitution values?

2.7. Miscellaneous

- What kind of reporting does your solution provide for email marketing?
- Does your solution provide reply-back and bounce management capabilities?
- What kind of opt-out procedures does your solution provide for email recipients within the email stationary/content?
- Does your system have an in-bound email response handler that deletes subscribers from the database if their e-newsletter replies contain words such as "unsubscribe," "remove," or "delete" in the subject line or body of the email? Can all other replies be immediately forwarded to the client?
- Can your solution get around spam blockers for major internet providers (AOL, Yahoo, etc.)? Please describe.
- Does your solution automatically screen for malformed email addresses on import?

- Can you track how many people sign up from forwarded messages? What is the accuracy rate?
- Describe how sharing of all types of content is encouraged and facilitated by the solution, including emails, pages, donation forms and campaigns, etc. Include any functionality within the system and also any integration with external services and social networks.

3. Online Fundraising

Pathfinder seeks to raise money more effectively from its online supporters. Please respond to the following questions in relation to our key requirements for online fundraising:

3.1. Online Giving Options

- Do you provide online fundraising capabilities? Please describe.
- Do you provide the ability to run multiple, simultaneous campaigns (renewals, capital, annual, program based, etc.)?
- Do you provide the ability to split one donation among several programs as directed by the donor?
- Do you provide support for recurring giving, e.g., \$100 per month with automatic credit card processing? Describe any efforts.
- Do you have support for matching gift programs?
- Do you have the capability for both individuals and organizations to donate online in a way where reports and receipts clearly show who the legal donor is?
- Do you have the capability for donors to make gifts in tribute to someone? Can a single gift be made in tribute to multiple people?
- Can your tax receipts for ticketed events show the following: the amount paid, the value of any benefits received and a description of said benefits?
- Can a constituent pay for a ticketed event and make a separate donation in a single transaction? Will the system be able to receipt this properly in accordance with IRS regulations?
- Can a constituent pay for an item in the store and make a separate donation in a single transaction? Will the system be able to receipt this properly in accordance with IRS regulations?
- Does your system have integrated fundraising capabilities with online social media sites (Facebook, Twitter, etc).
- Can we process refunds to donors who either made a mistake or otherwise need their donation refunded?
- Can donations be accepted from outside the US?

- If donations do not go through, do you have a way to track what errors may occur in the system so as to help guide the donor through the giving process correctly?

3.2. Donor Experience

- Can you provide an automated acknowledgement and IRS compliant receipt?
- Does your company provide for customization of on-screen thank you and email acknowledgement based on campaign and giving levels?
- Do credit card receipts display the name of the organization or the vendor? Can the displayed name be customized per campaign, per form, etc.
- Does your product have integration with an email marketing systems to enable email based asks?
- Can you customize online giving levels based on past giving history (if visitor is recognized by system)?
- Can you customize online giving levels based on region or areas of interest?

3.3. Merchant Accounts

- What options do you provide for online transaction processing?
- What merchant accounts can you support?
- Do you provide support for multiple merchant accounts?
- Please detail all the credit card types that you support.
- Who is your online payment gateway?
- Do you support alternate checkout methods such as Google Checkout, Kombini, PayNearMe, PayPal? Please list all supported.
- Does your system support mobile giving? Please describe.

3.4. Conducting eCommerce

- Does your company provide eCommerce capabilities for selling products, services, or digital assets through an online storefront?
- How do you handle shipping costs? Do you calculate shipping by weight, product count, dimensions or other methods? Which shipping carriers are you currently integrated with? Can you carry our negotiated rates in your system for online shipping charge calculations?
- How are taxes handled? In what countries are you registered to remit taxes? Do you use a third-party service to remit taxes?
- Is there a limit to how many products we can have in our store?

- Can we offer my members or other groups a special discount on items?
- Can you help us keep track of my inventory?
- Are there additional or different transaction processing fees for product sales versus donations?
- What happens if someone wants to return/refund/exchange an item purchased in our online store?
- Does the solution provide a method of using inventory as premiums as part of a fundraising campaign.

3.5. Fundraising events – online calendar and ticketing

- Does your solution provide support for an online database driven calendar?
- What ticketing and online transaction options do you provide for events? Can we create multiple ticket classes and target them to donors based on giving/member category?
- Do you support guest lists?
- Do you support multi-part events?
- Can you provide tax receipts for ticketed events?
- Will we have the ability to create ad-hoc ticketing forms? What kind of flexibility do we have in creating such forms?
- Can you support attendance limits to prevent overselling of tickets? If an attendance limit is reached, is there an option for a waiting list, automated response, alternative signup, etc.?
- Do online event registrants get automatic confirmation emails?
- Can you support automatic, optional attendee reminders?
- Can we target events on our website or via email based on the constituent's location, membership level and/or interests?
- Do your events tools have integrated e-mail capabilities for marketing the event?
- Does the solution provide for collecting and publishing content (e.g. photos, videos, documents) from event participants?
- Does the solution facilitate promotion via social networks, e.g. suggested integrated event & session hashtags, integration with Facebook events, evite.com, Outlook and other calendaring systems?

4. Advocacy

Pathfinder seeks to mobilize supporters to take action on issues related to our mission. Please address the following questions around our key requirements for online advocacy:

4.1. Activist Experience

- Does your solution allow registered site visitors to see their activism and donation history?
- Does your solution allow for a points-based system so registered users can compete and compare their level of engagement with other users?
- Does your solution allow registered users to control and modify their own profile, select interests and preferences for online and offline communications, and opt out of future communications?
- Does your solution ensure that users only see the actions that are appropriate for them to take?
- Does your solution enable personalization so that any page created through the system can be set up to appear only to registered users; and filtered such that only registered users who meet certain criteria see the page?
- Does your solution automatically create a "results" page for each advocacy campaign that activists can see after they have taken an action?
- Are new users coded with "source" automatically if they joined online through an Action Campaign page or sign-up form?
- What are the editing capabilities for an activist record?
- Can activists take action by email?
- Can a user take action without entering a password or accepting session cookies?
- Can online activists look up their legislators?

4.2. Alert Creation

- Does your solution provide constituents an option to select multiple targets or subsets of target groups for any advocacy campaign?
- Does your solution allow for the creation and reuse of custom targets?
- Does your solution allow groups of targets to be created and stored in the system for future use on any advocacy campaign?
- Does your solution provide the ability to fax some targets and email other targets from the same action alert?
- Describe in detail how the solution conveys information to action targets, e.g. by email, web form, fax, etc., and also how these are kept active and functional on an ongoing basis.
- Describe any SMS integration.

- Does your solution provide delivery rollover if a messages fails to get through one channel?
- What kind of message and subject editing capabilities does your company provide to the online activist?
- Can you configure alerts such that only activists from specific states can take action on a given issue?
- Can your solution categorize advocacy campaigns into themes or issues?
- Can the solution setup alerts where parts are customizable and others are not?
- Can the solution perform A|B testing on alerts?

4.3. Targeting the alert

- What kind of viral marketing tools do you have built into your action center?
- Do alerts have ZIP+4 options for split districts?
- Can the system group and display nation-wide actions separately from state-wide actions?
- Can activists be selected based on the legislator's membership of a given House or Senate committee (or vote on a given issue)? For example, can we select only the activists living in a district of someone who sits on the House Judiciary Committee?
- Can different messages be displayed, depending on whether the target is a legislation co-sponsor or not?

4.4. Vote Tracking and Outside Integration

- Can your solution help track and manage votes?
- Can your solution help us develop an online legislative scorecard?
- Can your solution help us send "thank you" or "complaint" emails/faxes to legislators based upon how they voted on a given issue?
- What advocacy databases does your solution provide? How often is the legislative representative data refreshed?
- Describe any additional integration with governmental information systems.

4.5. Reporting

- What type of advocacy reports does your solution provide?
- Will we be able to see the results of a given alert (or family of alerts) over a period of time?
- Can advocacy reporting be segmented by state or region?
- Can administrators pull reports listing all messages a given target (or group of targets) has received over time on a given alert (or family of alerts)?

- When activists edit or customize message copy, are message contents recorded?

5. *Online Constituent Relationship Management*

Pathfinder seeks the use of an easy to use online marketing database for its online eCRM needs. It should also work with our existing backend database. Please respond to the following questions that address our key requirements for database management:

5.1. *Contact Management*

- What is your company's database capacity for number of constituent records?
- Will our staff be able to upload new users? Does the system provide a web accessible history of uploads and downloads?
- Does your system have some de-duplication capabilities built in, including: Background detection of potential duplicates based upon specified criteria including name, email, and/or address; Duplicate resolution facility to compare duplicate records and selectively merge all or parts of the records?
- Does your company allow querying by every field and multiple fields in the database?
- Can queries be stored and used to send alerts and messages to subsets of the database?
- Does your company provide the flexibility for us to add and use additional fields as needed?
- Can constituent records be seen and edited by a manager (all emails that a particular constituent has received, all action alerts and fundraising appeals responded to, the overall response rate)?
- Can we add notes on the constituent profile about telephone calls or visits?
- Can a single constituent record contain multiple email addresses? Can the constituent define different contact inclusions/exclusions for their multiple email addresses?
- Can custom fields be created? Can they be populated by scheduled or manually triggered query/formula?
- Does your solution allow for targeted social media monitoring of constituents, based on email address and name? If not, what sorts of integrated features does your solution offer with respect to social media (facebook, twitter, linkedin, ect.)?

5.2. *Exchanging data with back-end databases*

- Describe in detail your solution's data exchange process?
- How does your data exchange process work with my donor database?
- What file formats does your database support?

- Does your solution support web services?
- Please detail the systems with which your solution supports ETL processes.
- Can your data exchange process be automated?
- Do you have published APIs for your system? If so, please provide a copy.
- Can additional APIs be created by clients either independently or in conjunction with professional services?
- What type of data can be processed via your data exchange process?
- Are there any barriers to donor or financial information going between the two systems?
- What happens when information for the same person changes in both databases?
- Will your company store my donor database's unique ID for each constituent?
- What can be done to reduce duplicates? Can we define rules for handling potential duplicates, specify when to create new record, merge info and more?
- Can we optionally review possible duplicates before importing into offline database(s).
- Please provide several examples of clients successfully leveraging integration between the proposed solution and their donor database.

5.3. Enhancing Loyalty with Online Constituents

- Can registered constituents accrue rewards points for taking some actions, e.g., forwarding emails, email newsletters, making donations, etc.
- Can we set the number of points accrued for each activity?
- Can we quantify individual or aggregate online interactions based on the collected data?
- Can the accrued rewards points and/or redemption history be displayed when a constituent logs on to the Website or be displayed in email message?
- Are online constituents able to redeem rewards points online?
- Can we display a personal rewards page showing points balance, points redeemed and redemption gift options?
- Can we gather data about multiple users points and out that data to a graphical display? (e.g., run a search on number of people who took action in the US in 2011, if we have a campaign to challenge people to reach a certain target goal?)
- Describe the solution's constituent-led fundraising capabilities. Please provide examples of successes in this area.

5.4. Conducting Online Survey

- Does the solution provide a tool for creating online surveys and polls?
- Can we target the surveys displayed on our website to certain visitors based on prior history, membership and/or interests?
- Does your survey tool provide the ability to respond in multiple response formats, including yes/no, multiple choice, rating and ranking scales?
- Does your survey tool provide the ability to conditionally route respondents along different survey paths based on the responses they provide.
- Can you automatically display survey results in tabular and graphical format for real time reporting?
- Are individual survey responses automatically written back to the online contact database and correlated to the correct constituent?
- Does your product make it easy to embed surveys within HTML emails to conduct email-based spot polls?
- Can a survey submission trigger an auto-responding email?
- Can we use your survey solution to create an RSVP for events? Detail the process/feature-set.
- Can you put a maximum response number of surveys/RSVPs? If the maximum is reached, can it trigger an alternate auto-responding email?

5.5. Online Directory Capabilities

- Does your solution provide an online, password-protected, searchable directory?
- Can we specify which fields from database are included in the directory?
- Can constituents control whether they appear in the directory and, if they choose to appear, which fields should be displayed?
- Do you have at least three standard searches (Quick, Basic, Advanced) that can be customized to include different fields?
- Can people be part of multiple directories based upon affinity?
- Can the directory sort results based upon any criteria?
- Can we configure which fields appear in search result?

6. Custom Lists & Online Databases

- Does the solution allow for the creation of custom lists?
- Does the solution allow for the creation web-based relational databases?

7. Technical Infrastructure

Pathfinder seeks the use of a scalable, robust and secure technology for its online eCRM needs. Please address the following questions regarding our key requirements for the core technology:

7.1. Core Technology

- If you are proposing a hosted solution, please describe your hosting environment.
- Describe your data storage and hosting facility.
- Describe your data back-up capabilities.
- Does your company use an offsite data vaulting service?
- How do you test your products and what is the quality assurance process?
- What is your disaster recovery strategy?

8. Security

Pathfinder requires a solution that supports current and foreseeable information security best practices and global legal requirements. Please provide copies of the policies, procedures and certifications supporting your solution.

- What data security and governance standards and certifications (such as PCI, MA 201 CMR 17) do you adhere to or carry? Please list all applicable.
- What are your policies and protections in place today for data at rest? Are there upgrades planned?
- What are your policies and protections in place today for data in motion? Are there upgrades planned?
- Are you SAS70 Type II certified? If so, can you provide us with the auditor's type I and II reports?
- Please provide a copy of your approved security policies
- Do you have staff dedicated to online security? How many? What certifications do they carry such as CISP?
- To whom does your online security team/officer/staff report?
- Have you experienced any security problems in the last 5 years which have required notifications to your direct customers or their constituents?
- Please describe your policies and recommended training and best practices for your customers such as Pathfinder as to how they should interact with your systems.

- How does your system use Cookies? How is the browsing experience different with cookies disabled? Do you permit the use of client-side technology such as Flash or Silverlight?

9. Scalability & Stability

Pathfinder requires a solution that supports current system requirements and that can scale seamlessly for significant growth in content size and delivery options, visits, communication transactions and fundraising transactions.

- How many transactions can your system handle?
- When was this last tested and how?
- How many unplanned outages of more than 1 second have you experienced in the last 5 years? Please describe length and reasons.
- How many planned maintenance events did you schedule and / or perform in 2010? Please describe length and reasons.
- What are your policies for system notifications during outages and for planned maintenance?
- What are your expansion plans for 2011 and 2012?
- Please describe your operational monitoring capabilities, staffing and policies.

10. System Requirements and Standards

- Do your company's HTML creation products adhere to web accessibility standards? Can users customize their experience in this regard, e.g. selecting font sizes to be used when viewing all content?
- What are your system requirements for end users (i.e. online constituents)?
- What are your system requirements for application administrators?

11. Managing Special Events

Pathfinder may seek to raise money and build awareness at some point through special events such as walks, runs and galas. Please answer the following questions regarding potential key requirements for managing special events:

11.1. Online Event Registration

- Provide a detailed breakdown of your special events product functionality, including reporting and fulfillment capabilities.
- What kind of individual registration options do you provide?

- How does your solution handle cash management?
- Can a user delete an account once money has been credited to them?
- What kind of participant search options does your company provide?
- What kind of offline gift capabilities do you provide?
- What type of reporting do you provide to end users?
- What administrative reports are provided to event managers?

11.2. The Volunteer Experience

- What giving options are provided to end users?
- Can event participants save emails they send out as templates?
- Can you provide automated encouragement emails?
- Do you support the use of volunteer fundraising teams?
- What capabilities do you provide to volunteer fundraisers for building and marketing their personal pages?
- Can you save personal pages of volunteers from one year to the next?

12. Deployment and Company Information

Pathfinder prefers proven solutions over unproven custom-developed solution when possible. Our new website solution should be able to have working staging site up within a few weeks and go live no later than three months. A strong commitment to the delivery date is expected and the required technology/solution must be able to interweave with existing website, undetectable to end-users and not interfere with majority of existing web structure.

12.1. Implementation Processes

- Describe your deployment and implementation process.
- Describe your product training process. Please provide several example training plans.
- Describe how customer input is solicited in determining enhancements. Is there an active user group?
- Describe notification process regarding system outages, both planned and unplanned. What is your standard planned uptime? How are planned outages scheduled?

- Will you be able to help us transition the content on our existing site to the new site?
- Can you provide resources to help us manage our system?
- Do you provide strategic assistance? Can you help us develop an online marketing and/or fundraising plan?
- What is your service level agreement (SLA)?
- What is your upgrade process?

13. Support

- Please describe how the solution(s) will be supported, including but not limited to:
 - User community/ies
 - Leveled support, phone or online
 - Online knowledge base.
 - 3rd party providers

14. Corporate Information

(If proposing integrating several products or services, please provide for each.)

- Please provide a corporate overview, including historical financials.
- What is the background of your management team?
- How long has your company been in business?
- How many employees does your company have?
- Describe your experience working with our type, size of organization?
- What sort of help/support is provided with the platform?
- Describe overall results achieved for clients in the areas of fundraising, communications, advocacy and cost savings?

J. Solution Pricing

In your response to our RFP, please include breakdown of costs by components for a complete implementation and annual support. Indicate the breakdown for:

Implementation

Hardware
 Solution licenses
 Third party components
 System integration & ETL functionality
 Custom development (include hourly rate)

Training of users/administrators,
Other

Maintenance (on an annual basis)

Support

Licensing

Maintenance

Further suggested customization

Consulting

If there are limits and costs associate with any type of transactions, faxes, page limits, storage usage and bandwidth usage, please indicate them separately. If you have a standard documented pricing plan, please provide that.