

# Request for Proposal: CRM Platform

Fòs Feminista is issuing this request for proposals for a constituent relationship management (CRM) platform to manage its donors, supporters, advocates, partners, and other key stakeholders. As a feminist organization, we prioritize intersectionality, diversity, inclusivity, and justice in all aspects of our work, including the tools we use to manage our relationships with our supporters. We are seeking a CRM platform that can help us engage with our diverse community in a meaningful and empowering way, while also providing the necessary functionality to support our advocacy, fundraising, and outreach efforts.

We encourage proposals from vendors who share our commitment to gender equality, reproductive justice, and social justice more broadly. We are especially interested in platforms that can support us in our goal to reach underrepresented and marginalized communities.

We believe that a powerful CRM platform can be a critical tool in advancing our mission of reproductive access and justice. We look forward to reviewing proposals from qualified vendors who share our vision and are committed to building a more just and equitable world. Thank you for your interest in partnering with us to create a world where everyone has the power to make their own reproductive decisions.

## About Fòs Feminista

Fòs Feminista is an intersectional feminist organization centered around the sexual and reproductive rights and needs of women, girls, and gender-diverse people. Led and governed by the Global South, Fòs Feminista works as an alliance of 220+ organizations across more than 40 countries worldwide to advance sexual and reproductive health, rights, and justice. As the connecting fabric of this alliance, Fòs Feminista orchestrates transnational and transregional action, amplifies partners' work, and promotes South-South learning and collaboration toward achieving common objectives.

Together with our partners, we provide access to sexual and reproductive health care, including contraception, abortion, and care for victims of gender-based violence, and we reach young people with comprehensive sexuality education. We recognize that the ability of women, girls, and gender-diverse people to make free and informed choices about their sexual and reproductive lives, including to access safe and legal abortion, is central to their life plans and to achieving gender and reproductive justice.

As such, we are at the forefront of advocating for sexual and reproductive health and rights from an intersectional lens in national, regional, and global spaces, coordinating with our partners to ensure that diverse experiences, priorities, and voices of the Global South are represented in these spaces.

## Background & Context

After [redefining its identity](#) in 2021, Fòs Feminista has continued to make significant strides in its ongoing journey of transformation by refreshing its strategy to reflect the organization's bold new priorities and expanding and consolidating the transnational alliance of feminist organizations advancing sexual and reproductive health, rights, and justice.

This will also be a year of evolution and growth of the organization's fundraising efforts. To realize its bold ambitions, Fòs Feminista must accelerate its fundraising and dramatically grow its base of supporters. The Resource Mobilization & Communications Unit has already begun scaling up internal resources with the aim of expanding and reinforcing the capacity and skillset of our fundraising team.

In addition to these efforts, our team will require a CRM platform that will enable us to:

- offer a best-in-class integrated donor experience across the range of potential touch points, including digital, physical mail, social media, advocacy, events, campaigns, estate planning, donor advised fund giving, etc.
- develop cross-functional multi-domain analysis that encompasses all donor channels and touchpoints, as well as other Fòs Feminista financial and operational data sets (ERP, large-scale cross-team grants, etc.).
- Ensure the highest levels of data security, encryption, and compliance with the ever-evolving regulatory environments.

## Platform Requirements

Fòs Feminista seeks a constituent relationship management platform which meets the following high-level, priority requirements. The selected solution should:

- Be a cloud-based and browser-accessible platform that is managed by the software provider.
- Allow for enough user licenses so that team members and consultants in different locations can work simultaneously. Fòs Feminista has 20-30 active licenses for users across 4 continents in its current CRM platform.
- Offer a 360-degree view of Fòs Feminista individual donors, partners, and foundations that encompasses:
  - donor profile data (e.g., demographics, relationships, affiliations),
  - reporting and analytics (e.g., campaign response, event attendance, web interactions, cross-channel),
  - giving history
  - engagement (e.g., the CRM platform tracks results from communications with constituents via direct mail, events, SMS, phone, and email)
- Provide integration opportunities with other systems and applications, including our ERP (Microsoft Dynamics 365 Business Central), third-party prospect research databases, etc.

- Include features that enable the design of donor journeys tailored to specific segments (e.g., prospects, new donors, lapsed donors, etc.).
- Come with built-in encryption that is GDPR- and Shield Act-compliant to provide top-level protection of donor and organization data.
- Provide remote access for all users through their mobile device and/or from a desktop anywhere where there is Internet access.
- Have customizable grants management functionality to allow Fòs Feminista team members to see every moving piece of a grant and donor relationship and provide real-time reporting or analysis.
- Include or allow for integration with a bulk email tool for sending email messages to Fòs Feminista donors and supporters.
- Feature customizable reports and dashboards.
- Provide training and documentation for platform users.
- Offer support (via email or live chat) to users.

Please note that the scope of this project does not include platform implementation services.

## Proposal Submissions

Proposal submissions should address the following questions:

- What is your experience in working with nonprofit organizations, and how have you tailored your solutions to meet their unique needs?
- How does your CRM platform support multi-channel communication with constituents, including email, phone, social media, and direct mail?
- How does your platform handle data segmentation and targeting for personalized outreach and fundraising appeals?
- How does your platform integrate with other software solutions commonly used by nonprofits, such as fundraising, volunteer management, and event management software?
- How does your platform ensure data security and privacy, particularly in light of the General Data Protection Regulation (GDPR) and other relevant regulations?
- How do you support training and onboarding for nonprofit staff members and volunteers who will be using the CRM platform?
- What kind of ongoing support and customer service do you offer to ensure the platform remains effective and up-to-date over time?
- Can you provide examples of how your platform has helped other nonprofits achieve their goals, such as increasing donor retention, improving volunteer engagement, or enhancing program impact?

- What is your pricing structure for the CRM platform, and are there any additional costs for implementation or ongoing maintenance?
- How does your platform measure and report on key performance indicators (KPIs) related to nonprofit engagement and fundraising success?
- Does your platform include or allow for integration with a bulk email tool for sending email messages to Fòs Feminista donors and supporters?

**Financial/Cost Breakdown:** all submissions must include a detailed break-down of estimated annual budget based on the requirements outlined above, providing clarity on your fee structure and payment schedule for the services.

## Evaluation Criteria

Prospective partners will be evaluated based on the following criteria:

- **Alignment with organizational goals:** How well does the proposed CRM platform align with the Fòs Feminista's goals, mission, and values?
- **Features and functionalities:** Does the platform meet the nonprofit's specific needs for donor management, event management, and other key areas of focus?
- **Ease of use and accessibility:** Is the platform user-friendly and accessible for staff members with varying levels of technical expertise?
- **Data management and security:** Does the platform provide robust data management and security features to ensure compliance with relevant regulations and protect constituent privacy?
- **Integration with other software solutions:** Does the platform integrate with other software solutions commonly used by nonprofits, such as fundraising and event management software?
- **Training and support:** Does the vendor provide comprehensive training and ongoing support to ensure successful implementation and adoption of the platform?
- **Cost and value:** Is the pricing structure reasonable and transparent, and does the platform provide sufficient value for the cost?
- **Vendor experience and reputation:** Does the vendor have a proven track record of working with nonprofits and delivering effective CRM solutions?
- **User reviews and references:** What feedback do current and past users have about the platform's effectiveness, ease of use, and customer support?
- **Future scalability and flexibility:** Will the platform be able to grow and adapt as Fòs Feminista's needs and priorities evolve over time?

## Instructions for Submission & Proposal Evaluation Timeline

Proposals must be emailed to [rfp@fosfeminista.org](mailto:rfp@fosfeminista.org) on or prior to the submission deadline (to the attention of Milo Sybrant, Chief Development Officer, Co-Lead, Resource Mobilization &

Communications Unit).

| Activity  | Completed by: |
|---|---------------|
| Launch of RFP   | Wed 03/08     |
| Please submit your proposal to <a href="mailto:rfp@fosfeminista.org">rfp@fosfeminista.org</a> | Wed 03/22     |
| Review of proposals by Fòs Feminista procurement committee and notification of finalists      | Tue 03/28     |
| Vendor demos upon request   | Thu 04/06     |
| Final selection of vendor   | Thu 04/13     |
| Selected vendor to begin  | Fri 04/21     |

This RFP is a solicitation of bids only and neither the issuance of this RFP nor the submission of a responsive proposal shall be binding on Fòs Feminista. Fòs Feminista reserves the right to accept or reject any or all proposals or to cancel this RFP for any reason or no reason. No binding agreement shall exist with respect to the provision of services unless and until a definitive agreement has been agreed and executed by both Fòs Feminista and the selected service provider(s). Fòs Feminista will not be liable under any circumstances for any expenses incurred by any bidder in connection with the RFP proposal submission or selection process.

We thank you in advance for your time and effort in completing your proposal and look forward to receiving it. Good luck!