REQUEST FOR INFORMATION

RFI # 0044

Issued by: United Planning Organization, Washington, DC

Issue Date: July 31, 2025

FUNDRAISING & DONOR MANAGEMENT INFORMATION SYSTEM

Response Deadline: <mark>August 29, 2025</mark>

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I.   PURPOSE

United Planning Organization (UPO) is issuing this RFI to gather information from qualified organizations or individual consultants interested in providing descriptions, pricing, marketing materials and demos from qualified vendors that can provide a reliable Fundraising & Donor Management Info System for consideration.

This RFI is for planning purposes only and does not constitute a commitment to purchase or contract.

II.   BACKGROUND

UPO is a 501(c)(3) private non-profit corporation and the designated Community Action Agency for the District of Columbia (DC). UPO specializes in providing economic security support services and human services to DC residents who have low income with the goal of helping them to achieve economic security. To increase its donor base through successful fundraising initiatives, UPO seeks to procure an effective FUNDRAISING & DONOR MANAGEMENT INFORMATION SYSTEM that will make it relatively easy to cultivate donors, document gifts, steward the relationship with donors, and strategically increase the share of its annual resources that are comprised of gifts from individuals and foundations. Ultimately, UPO's goal is to procure an effective Fundraising & Donor Management Information System (DMIS) that will help to streamline operations, enhance donor relationships, and maximize fundraising efforts.

III.   INFORMATION REQUESTED

Please include the following in your response:

- **Organization Overview:** History, mission, and relevant experience

- **Proposed Solution:** Summary of the information and how it aligns with the UPO's goals

- **Technology/Methodology:** Any tools, processes, or platforms used

- **Estimated Costs:** General pricing structure (ballpark figures are acceptable)

- **Case Studies/References:** Similar work with other nonprofits or communities

- **Additional Value:** Any extra features or community engagement strategies

- **Demonstration:** Possibility of demo(s) of the proposed DMIS

IV.   **DETAILED FEATURES OF DESIRED FUNDRAISING & DONOR MANAGEMENT INFORMATION SYSTEM**

A.   <u>**Core Donor Management & Data Features:**</u>

- **Centralized Donor Database:** A comprehensive repository for all donor information, including contact details, demographics, giving history (online and offline), communication preferences, interests, and engagement activities (event attendance, volunteer hours, etc.).

- **Detailed Donor Profiles:** Customizable profiles that provide a 360-degree view of each supporter, allowing for personalized outreach and stewardship. This includes tracking family units, household giving, and even custom fields for unique data points (e.g., T-shirt size for volunteers).

- **Donor Segmentation:** Tools to easily segment donors into meaningful groups based on various criteria (giving level, frequency, interests, involvement, recency), enabling highly targeted communications and campaigns.

- **Data Health & Hygiene**: Features for maintaining accurate and up-to-date data, including duplicate detection, address verification, and standardized data input procedures.

- **Wealth Screening/Prospect Research**: Capabilities to identify potential major donors by assessing their giving capacity, philanthropic interests, and connections.
- **Pledge Tracking:** Ability to track and manage donation pledges, including payment schedules and reminders.

- **Relationship & Interaction Tracking**: Logging all communications (emails, calls, meetings, social media interactions) and activities with donors, providing a complete history of engagement.

- **Constituent Timeline:** A chronological view of all interactions and donations for each supporter.

B.   <u>**Fundraising & Campaign Management Features**</u>:

- **Customizable Donation Pages/Forms:** Branded, mobile-responsive, and secure online forms that are easy for donors to use and embed on

websites.

- **Recurring/Monthly Giving:** Functionality for donors to set up automated, recurring donations. **Payment Processing:** Secure integration with various payment for seamless online transactions.

- **Digital Wallet Options:** Support for popular digital payment methods.

- **Campaign Management:** Tools to plan, execute, and track the progress of various fundraising campaigns (annual appeals, major gift initiatives, capital campaigns, etc.). This includes setting goals and monitoring key metrics.

- **Event Management:** Features for planning, promoting, and managing fundraising events, including RSVP tracking, ticket sales, attendee communication, and volunteer coordination.

- **Peer-to-Peer Fundraising:** Empowering supporters to create their own fundraising pages and solicit donations from their networks.

- **Crowdfunding:** Tools for launching and managing crowdfunding campaigns.

- **Matching Gift Support:** Integration with services that help donors identify and submit matching gift requests from their employers.

- **Grant Tracking:** Management of grant applications, deadlines, and reporting requirements.

- **Offline Donation Processing:** Ability to record and track donations received through traditional methods (checks, cash).

C. **Communication & Engagement Features:**

- **Email Marketing**: Integrated email marketing capabilities with professional templates, segmentation options, automation for thank-you's and follow-ups, and A/B testing.

- **Personalization Tools**: Features that allow for personalized communications beyond just addressing donors by name, using their giving history and interests to tailor messages.

- **Automated Workflows:** Automation of routine tasks like sending

donation acknowledgments, thank-you emails, and follow-up communications.

- **Direct Mail Integration:** Ability to generate targeted mailing lists and manage direct mail campaigns.

- **Communication History:** A record of all sent communications within donor profiles.

- **Donor Portals:** Secure online portals where donors can manage their contact information, view their giving history, access receipts, and make quick donations.

- **Social Media Integration:** Tools to connect with donors and promote campaigns on social media platforms.

D. **Reporting & Analytics:**

- **Customizable Reports:** The ability to generate detailed, custom reports on various metrics, such as donation trends, campaign performance, donor acquisition, retention rates, average gift size, and fund allocation.

- **Dashboards:** Interactive dashboards that provide a real-time, visual snapshot of key fundraising metrics and donor insights.

- **Predictive Analytics:** Features that use historical data to identify patterns and predict donor behavior, such as likelihood to give or suggested next gift amounts.

- **Financial Reporting:** Capabilities to generate reports for financial transparency and accounting purposes, often with integration into accounting software (e.g., QuickBooks).

- **Scheduled Reports:** Option to schedule automatic generation and delivery of reports to relevant stakeholders.

E. **System & Administrative Features:**

- **User-Friendly Interface (UI):** Intuitive and easy-to-navigate interface for all staff members, promoting efficient collaboration.

- **Scalability:** Ability to handle increasing volume of donors and data as the organization grows.

- **Integrations:** Seamless integration with other essential software and tools, such as:
  - ➢ NetSuite Accounting software
  - ➢ Email marketing platforms
  - ➢ Event management tools
  - ➢ Payment processors
  - ➢ Prospect research solutions
  - ➢ Website CMS (Content Management System)

- **Security Measures:** Robust security protocols to protect sensitive donor data, including data encryption, access controls, and compliance with data privacy regulations (e.g., GDPR).

- **Cloud-Based Access:** Ability to access the system from any device, anywhere, with an internet connection.

- **Mobile Access:** Dedicated mobile applications or responsive design for on-the-go access and data entry.

- **Task Management & Reminders:** Tools to manage, delegate, and automate tasks and set reminders for donor outreach and follow-ups.

- **Training & Support:** Comprehensive training resources, responsive customer support, and ongoing updates to the system.

- **Customization Options:** Flexibility to tailor data fields, workflows, and reports to meet the organization's specific needs.

At the minimum, the donor/prospect profiles in the FUNDRAISING & DONOR MANAGEMENT INFORMATION SYSTEM shared by vendors who respond to this RFI should include the following information/features:

• Contact information (work and home)

• Type of donor/prospect, i.e. former or current board member, volunteer, current or former staff, corporation, foundation, grant-making organization, etc.

Giving history with UPO to include their largest gift, their most recent gift, their recurring monthly gifts, their pledges, planned gifts, etc.

• Space to create contact reports of visits, telephone calls, emails, direct mail, etc.

• Moves Management – classifying donors/prospects by stages, i.e. identification, cultivation, solicitation, stewardship, and moving them along toward the solicitation and stewardship phases

• Space to create strategies for major gift donors/prospects

It should readily pull reports that show:
- • How many donors/prospects are cultivated/solicited on a monthly basis.
- • Year-to-year comparisons measuring dollars raised, donor retention rates, number of new donors, number of donors who increase their level of giving, amount of new dollars raised, amount of increased dollars raised. Ideally, an all-in-one FUNDRAISING & DONOR MANAGEMENT INFORMATION SYSTEM would integrate digital fundraising, grant management, direct mail, event planning, and major/planned/in-kind gifts management.

It is essential that comprehensive training and support are provided throughout the migration process, along with access to up-to-date support and training documentation.

V. SUBMISSION GUIDELINES

Responses should be submitted by **August 29, 2025** via email to procurement@upo.org Please format your submission as a PDF or Word document.

For questions or clarifications, please send email to Rizwanul Haque, Procurement Officer at rhaque@upo.org

Disclaimers:

This RFI is not a solicitation for proposals and does not obligate the United Planning Organization to take any procurement action. Responses will be reviewed for informational purposes only.