



**2015 Technology Partner
Request for Proposals**

Contents

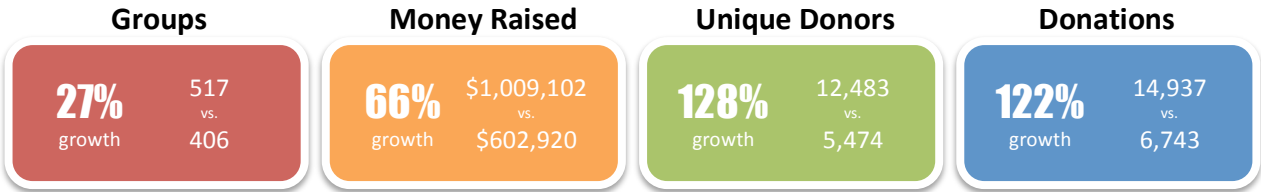
BACKGROUND	3
RFP PROCESS	3
RFP SCOPE	3
CONFIDENTIALITY	4
CONTACT INFORMATION	4
RFP SCHEDULE	4
GIVE OUT DAY SITE OVERVIEW	5
GENERAL PARTNERSHIP EXPECTATIONS	5
REQUIRED FUNCTIONS	5
DESIRED FUNCTIONS	5
DONOR TOOLS ON GIVEOUTDAY.ORG	5
REQUIRED FUNCTIONALITY	5
DESIRED FUNCTIONALITY	6
NONPROFIT TOOLS ON GIVEOUTDAY.ORG	6
REQUIRED FUNCTIONALITY	6
DESIRED FUNCTIONALITY	6
RFP RESPONSE	7
COMPANY INFORMATION	7
TECHNOLOGY PLATFORM	8
• DEVELOPMENT	8
• ARCHITECTURE	8
• QUALITY ASSURANCE	8
• ROADMAP	8
• DATA & SECURITY	8
• CAPACITY/PERFORMANCE	8
• OPERATIONS	9
• IMPLEMENTATION/MIGRATION	9
• PRICING	9
• SUPPORT	9
• GIVING DAY FUNCTIONALITY	9
• FULFILLMENT	10
PLATFORM FUNCTIONALITY	10
• DONORS	10
• ORGANIZATIONS	10

Background

Give OUT Day is an annual, 24-hour online fundraising competition that unites the LGBTQ community nationally to raise critically needed funds to support the diverse array of LGBTQ nonprofits including community centers, arts groups, organizers, clinics, student clubs, sports leagues and more.

Organized by Bolder Giving (a NYC-based nonprofit that works to inspire people to give - www.boldergiving.org) and powered in its first two years by Razoo, Give OUT Day offers hundreds of LGBTQ organizations across the country to take part in a shared 1-day fundraising campaign in May to raise money and awareness for the LGBTQ community. Launched in 2013 with considerable successes, in its second year Give OUT Day saw major growth on every metric of success, despite a 2.5 hour network outage in the early evening that caused organizers to extend the event for an additional 24 hours.

2014 vs. 2013 Comparison of Results



As we look towards Give OUT Day’s third year, we anticipate continued growth of nonprofit participation and funds raised, especially as many LGBTQ organizations have begun to integrate Give OUT Day into their annual fundraising plans and volunteer engagement efforts. This giving day has quickly become a major national fundraising event within the LGBTQ community and we seek a technology partner to help build and manage a robust online platform to support this growing effort and help us take Give OUT Day to the next level for 2015 and beyond.

RFP Process

Give OUT Day is looking for a strategic technology partner to continue its efforts to increase charitable giving to the LGBTQ community across the country through an online day of giving. If you are interested in being considered as the technology partner for Give OUT Day, we ask that you reply to this RFP by answering the range of questions outline in the RFP Response section below about your company, the technology platform you propose to create for Give OUT Day, and it’s functionality.

We will accept questions from possible RFP respondents through September 17th and will share all submitted questions and our answers with all invited respondents by September 22nd (to ensure fair engagement, we will share all questions asked of us that are generally applicable to all respondents, although the source of all questions will be held confidential and we will anonymize questions as needed). Confidential RFP responses must be submitted by September 26th and we will schedule short presentations from selected respondents for October 1-3. Our goal is to issue an initial Letter of Intent to our preferred vendor by Oct 10th and complete negotiations and sign a contract by October 31st.

RFP Scope

Specific information is requested according to the RFP Response Form in this document. You may submit additional information beyond that requested in this RFP by the deadline. All additional information will be used in consideration of our technology partner selection.

Confidentiality

All information included in your response to this RFP is confidential and will only be shared with the review team at Give OUT Day. We may share aggregate trends (i.e. X% of giving day providers are or plan to offer text to give functionality) but no specific information about any providers plans, current capacities, pricing or other information (included in your response or disclosed in discussions connected to it) will be disclosed to any other party without your prior written approval.

Contact Information

For questions or comments with regard to this RFP, please contact:



RFP Schedule

- September 8, 2014 RFP is sent out
- September 17, 2014 Last date for questions to Give OUT Day
- September 22, 2014 Last date for submission of answers from Give OUT Day
- September 26, 2014 RFP responses due
- October 1-3, 2014 Selected Vendors deliver RFP presentations (WebEx or in-person)
- October 10, 2014 Vendor selection – Letter of Intent
- October 31, 2014 Contract signed
- January 31, 2015 All migration completed and pre-day registration page launched

Give OUT Day Site Overview

This section gives a general overview of the current and desired Give OUT Day website functionality and expectations for how we will work with the selected partnership to plan, develop, and manage the operations of Give OUT Day.

General Partnership Expectations

- Give OUT Day will be a private label website branded as such (white label solution)
- Give OUT Day will own all data generated by its platform
- We are looking for a strategic partner to grow online giving nationally for the LGBTQ community for 2015 and potentially on an ongoing basis

Required Functions

- The ability for every 501(c)(3) organization serving the LGBTQ community (eligibility to be confirmed by the Give OUT Day organizing team upon registration) to have a webpage that they can update with videos, pictures, copy, and be able to share easily via social media.
- The ability to add a donation to Give OUT Day during the transaction process (add a “tip” for the Give OUT Day organizers).
- Give OUT Day Mobile: A mobile optimized version of the giveoutday.org platform
- Ability to search causes or view giving opportunities on a map.
- Deep integration with social networking platforms.
- Rich analytics and donation reporting.
- Dynamic home page that allows Give OUT Day staff to respond to and share real-time updates, news, and promotions.
- The ability to handle at least 100 donations per minute.
- Create leaderboards based on number of donors, dollars raised, etc., and update in real-time
- Support random drawings from donations made for “golden ticket” prize grants.
- Provide pre-event, event, and post-event landing pages with interactive features.
- Provide 24-hour customer service on the giving day.
- Strategize with the Give OUT Day team to continue to improve the giving day event.

Desired Functions

- Interactive applications for iPhone and Droids that offer gamification of giving.
- Giving Cards: E-cards and the ability to create branded giving cards
- Text to give options.

Donor Tools on GiveOUTDay.org

The Give OUT Day platform makes it easy for donors to find, learn about, and contribute to local and national programs that support the causes in which they believe. We are looking for a platform that will enable donors to utilize the following functionality.

Required Functionality

- Search Function: Search by program type, geography (city/state/zip), populations served, alpha-listing, keyword – and other factors – to find the programs that best meet their giving objectives
- Donor Profile: Track, organize, and retrieve donation information and tax receipts any time
- Participate in exciting and fun promotions on Give OUT Day.
- Fundraiser Pagers: Fundraise on behalf of their favorite nonprofit organization

- Payment Processing: Safely donate via credit card to reputable nonprofits officially vetted by the U.S. IRS.
- Instant email tax receipt for donations.
- Processing of recurring donations
- Shopping cart for multiple donations
- Planned, scheduled donations in advance of Give OUT Day

Desired Functionality

- Automatic alerts when a credit card used for a recurring donation is about to expire.
- Direct Debit from bank account as alternative to credit card or debit card giving and/or other alternative form of payment (i.e. Dwolla).

Nonprofit Tools on GiveOUTDay.org

Our goal is to help LGBTQ organizations increase their online giving, engaging both current and new donors to support their work. The platform provides fundraising tools and opportunities for organizations to create visually interesting pages that tell their stories to supporters. The tools must be easy to use and maintain even for the tech-challenged, especially as a majority of participating organizations have few staff or are completely volunteer led. We are looking for a platform that will enable nonprofits to utilize the following functionality.

Required Functionality

- Organization Page Dashboard: Personalize Give OUT Day pages by posting videos, photos, descriptions, and other materials – to give donors a strong sense of the organization’s mission, efforts, and accomplishments for every program they operate.
- Receive email notifications each time a donation is made
- Sharing and Embedding Capabilities: Embed buttons, links, and QR codes on the organization’s website and promotional materials.
- Accept donations directly from an organization’s website via the Give OUT Day widget
- Donor Data Management: Download donation reports and manage monthly disbursement through the organization page dashboard
- Project Pages: Allow organizations to create pages to raise money for a specific campaign or program
- Fiscal Sponsor Pages: Allow organizations to create free-standing pages to raise money for independent projects or organizations that are fiscally sponsored by a parent organization (parent may or may not be participating in Give OUT Day independently)

Desired Functionality

- Track Pledges made in advance of the giving day.
- Team Pages: Allow organizations to track donation progress, and encourage donors and volunteers to raise money through teamwork and friendly competition
- Mobile analytics (i.e. How many donations made on mobile, which types of devices, etc.?).
- Social media analytics (i.e. Which social networks are delivering traffic, which social media sharing tools are being used by those on Give OUT Day? etc).
- Event registration (i.e. Ability to make donations as well as register for fundraising events, memberships, etc.).
- Batch approval and upload: There are about a dozen national networks of different clusters of LGBTQ organizations (community centers, student clubs, etc) that we work with to engage their members. We would like the ability for each network to batch approve (or pre-approve) registration

applications for all of their members and possibly to also batch upload standard templates for all of their individual pages which then each member could customize.

RFP Response

Please reply to all of the following questions in your response to this RFP (noting each of your answers by section/number) to ensure ease of review.

Company Information

1. Company name
2. Company address
3. Company web page
4. Contact person for this RFP – Name, Telephone, Email
5. Main products/services
6. Main market/customers
7. Ownership structure with ownership status in percentage
8. Structure of mother corporation, joint ventures, subsidiaries, partnerships or other relevant relations
9. Number of years in the market
10. Company location(s)
11. Describe your Corporate Social Responsibility approach.
12. Describe your business continuity management plan.
13. Total number of employees
14. Size of Production Support team
15. Size of Technical Development team
16. Size of Marketing and Sales team
17. Size of Executive Management & Administrative team
18. Last year employee turnover
19. Last year revenue
20. Please provide information about your organization's financial viability.
21. Last year total donations processed
22. Number of clients
23. Size of largest client (in annual fundraising)
24. Size of largest client (in daily fundraising)
25. Anticipated capacity conditions within 12 months
26. Conditions that are listed in the RFP and can't be met
27. Description of products or services that are already delivered to customers today, and could be comparable to what is requested in this RFP
28. Description of products or services that are already delivered to customers today that are outside of what is requested in this RFP
29. What is your account management structure?
30. What additional strategic input will Give OUT Day be afforded?
31. Describe your white-label support of your platform for Give OUT Day.
32. Reference customers using comparable products or services (including contact information)
33. Reference customers using your products or services today, although they are not comparable with what is requested in this RFP (including contact information)

Technology Platform

Development

1. What languages/software is the platform built in (database, middleware, etc.)?
2. What source code control system is used?
3. What deployment tools are used?
4. What development methodology is used (include release cycle information)?
5. How many FTE developers are used (breakdown by employees/contractors/on and offshore)?

Architecture

1. Describe the technology architecture including architecture drawing.
2. Is the architecture shared with other clients?
3. Which components are high availability?
4. Which components are redundant?
5. Which components have manual failover?
6. Which components are virtualized?

Quality Assurance

1. What QA Tools are used for defect tracking?
2. What QA Tools are used for automation regression testing?
3. What QA Tools are used for performance/load testing?
4. How many FTE QA staff are used (breakdown by employees/contractors/on and offshore)?
5. How many test cases exist for the platform?
6. What quality metrics are in use for the platform?

Roadmap

1. Please include development/product roadmap for next 12 months.
2. What impact will Give OUT Day have on the development roadmap?

Data & Security

1. How can data be accessed on your platform and in what formats can it be exported?
2. Do you support 100% data ownership by Give OUT Day?
3. Please explain security protocols for accessing, displaying, storing, managing and communicating customer data.
4. Please explain security protocols for accessing, displaying, storing, managing and communicating financial data.
5. Are you PCI compliant? And to what level of PCI certification?

Capacity/Performance

1. Please include your standard Service Level Agreement (SLA) for capacity and performance.
2. Quantify Planned Outages for past 24 months.
3. Quantify Unplanned Outages for past 24 months.
4. How many SLA defaults have you had in past 24 months?
5. What was the worst SLA default you have had in the last 24 months?
6. Please describe your Capacity Planning Model.
7. Maximum Transactions per Minute (plan)
8. Maximum Transactions per Minute (actual)
9. How often are load and performance tests performed?
10. How many simultaneous users are supported on the platform?
11. What are the theoretical scale limitations of the platform?

Operations

1. Please include your SLA agreement with hosting/managed services provider.
2. Please include your hosting "Run Book" in your response.
3. What monitoring tools are in place?
4. Location/Provider/Tier Rating for Primary Data Center
5. Location/Provider/Tier Rating for Backup Data Center

Implementation/Migration

1. Describe implementation / migration services available.
2. Describe implementation / migration recommended approach, timeline and requirements.
3. Describe resource expectations of Give OUT Day staff during implementation /migration.
4. Describe tools available to migrate to your platform.
5. Describe quality assurance plan and approach for system implementation /migration.
6. Provide reference account metrics of past migrations.
7. Describe any manual migration work that may be expected.

Pricing

1. What are the transaction costs?
2. What forms of payment are accepted and their corresponding rates?
3. Additional Fees
4. Start up costs for Give OUT Day for platform
5. Revenue sharing model
6. Chargeback protection
7. Additional price discounting
8. For each \$100 contributed, how much goes to the nonprofit?
9. Does your platform have the capacity for donors to add a "tip" to their donation for Give OUT Day organizers?

Support

1. Phone support coverage
2. Email support coverage
3. Online chat support coverage
4. Special event coverage (nights/weekends)
5. What training for nonprofits is provided?
6. What training for Give OUT Day is provided?
7. Donor training (i.e. fundraiser pages)

Giving Day Functionality

1. How will you design and manage Pre, Event and Post Landing Pages?
2. Do you have the capacity to setup and run Giving Day Leaderboards?
3. Can you support matching grants? How are they setup by nonprofits and displayed on the site?
4. Can you support regular or random "Golden Tickets"? If so, how do you manage them?
5. Are there other gamification elements that you provide to incent giving?
6. Is there extended customer service support on the day?
7. Are there mobile giving day tools?
8. Do you support batch approval and content upload for networks?
9. Are there additional giving day features that we have not asked about?
10. Will you provide prize grant money for giving days?

Fulfillment

1. What is the nonprofit entity that receives, receipts, and disburses charitable gifts from donors to nonprofits?
2. Who are check disbursement partners?
3. What is the check disbursement process?
4. Check disbursement timing / schedule
5. Who are the EFT disbursement partners?
6. What is the EFT disbursement process?
7. What is the EFT disbursement timing / schedule?
8. Describe the IRS Business Master File (EIN) interface and validation
9. Due diligence process for disbursement
10. Fundraising/Solicitation Registration with respective Attorneys General in 50 states

Platform Functionality

Donors

1. Individual Fundraising for Orgs
2. Team & Event Fundraising
3. Tax-deductible receipt provided to donor
4. Giving Cards / Stored Value
5. Shopping Cart for multiple gifts
6. Recurring Transactions
7. 'Remember My Card' Function
8. Dedication/Tribute Notation on Gift
9. Designation/Purpose Notation on Gift
10. Scheduled Future Transactions
11. Responsive/Mobil UX
12. SMS Giving Function
13. 'Browse' Searching by Org Category
14. Search for Orgs with Matching Grants
15. 'Might Also Like' Recommendations
16. Find Org by City, State, ZIP Code and/or Keyword
17. User (Donor) Account/Profile
18. Transaction History Accessible by Donor
19. Receipt Archiving / Giving History Reports
20. Social Sharing of Pages
21. Commenting on Org Pages
22. 'Liking' Org Pages
23. Admin-like content creation and donation tracking of Fundraiser Pages
24. Social sharing CTAs post-transaction

Organizations

1. Org Leader Administrative Profile
2. Page Content: Narrative Text
3. Page Content: Recommended Donation Amounts
4. Page Content: Upload Images
5. Page Content: Embed Videos
6. Thank You Message to Donors
7. Thank You Video
8. Page Traffic Metrics

9. Sharing to Social Networks
10. QR Codes to Pages
11. Donation widget support for organization website embed
12. Widget customization (aesthetic, content, size)
13. Donation widget support for social media sites (e.g. Facebook, etc.)
14. 'Donate Now' Buttons
15. Offline donation support
16. Project / Child Pages (for fiscally sponsored projects or multiple projects)
17. Donation Report Interface
18. Available Donation Data Field List
19. Downloadable Donation Data
20. Admin Alert of Donation
21. Disbursement Report Interface
22. Matching Grant Posting
23. Matching Grant 'Tracking' in Live View
24. Push-button communication to donors/fans