



Organization Mission

The West Virginia Rivers Coalition Inc. (WV Rivers) is the only statewide organization dedicated to promoting the overall health of West Virginia's waters and their downstream benefits. For 35 years, WV Rivers has been at the forefront of policy discussions, advocating for clean and healthy waters for all West Virginians. We work to preserve and improve water quality through science-based policies that protect public health and support the conservation of our natural resources.

Challenges

The West Virginia Rivers Coalition (WV Rivers) is seeking to implement a comprehensive Customer Relationship Management (CRM) system to enhance data management, strengthen external communications, and deepen donor relationships as part of its growth strategy. While current systems are functional, they do not fully support seamless data integration and management, targeted outreach and communications, and other essential relationship-building tools. The organization aims to strengthen its operations and sustainability by adopting a more robust CRM system that will more effectively engage its growing supporter base, deepen community connections, and streamline donor and stakeholder communications. Additionally, the system will be able to support critical functions such as grant tracking and volunteer coordination as the organization continues to grow, ultimately advancing the WV Rivers' long-term environmental conservation and advocacy mission in West Virginia.

Project Objective and Timing

WV Rivers actively seeks a CRM vendor to enhance the management of our growing audience and supporter base. The proposed solution will serve as the central system for managing organization contacts and data, improving engagement efforts and tracking, and providing clear and actionable insights into our donor development efforts. By consolidating functions into one cohesive system, WV Rivers will replace outdated tools, including legacy CRMs, Excel, and other contact management software. This will enable more effective and efficient donor stewardship, supporter engagement, and overall relationship management as we expand our operations and strengthen our impact. Project milestones are as follows:

- **March 31, 2025 - Proposals Received**
- **April 15, 2025 – Review of Proposals Begin**
- **May 1, 2025 – Proposal Selection Made**

Key Decision Drivers

The selection of CRM will be heavily dependent on the ability to provide the following services:

1. **Donor Management**
 - I. Fulfillment of donor management requirements with functionality that includes bulk uploads and maintenance of data for supporters and donations, as well as the ability to enhance donor cultivation by identifying major donors, pledges, recurring gifts, donor retention, touches, and re-engagement, etc.

- II. Ability to view and customize contact profiles based on contact preferences, activity history, financial contribution summaries, additional notes, and donor planning and insights.
- III. Proficiency in segmenting donor audiences based on specific contribution criteria, including but not limited to major donors, recurring donors, and lapsed donors.
- IV. Increased potential for tracking donor interests and engagements with varying communications and campaigns.
- V. Robust reporting capabilities to summarize fundraising efforts, including acquisition ROI, bequests, total contributions, giving history, pledges, tribute gifts, etc.

2. Fundraising and Campaigns

- I. Create engaging and customizable fundraising efforts and various campaigns utilizing functions such as targeted emails, advocacy actions, petitions, contributions, signup forms, volunteer forms, ticketed events and story collections, etc.
- II. Ability to establish advocacy campaigns that target various regulation comment dockets, custom targets, and elected officials based on locality.
- III. Track and create reports based on supporter engagement, including total views and submissions, overall conversion rates, click rates, and amount raised (if eligible).
- IV. Capability to function as a basic event management system, enabling seamless coordination and tracking of supporter engagement in events.

3. Communications

- I. Fully supported external communications system that includes the ability to create customizable email and text communications with drag-and-drop email builders, A/B testing and optimization, brand-aligned templates and themes, default reusables and redirects, and automation for subscription management.
- II. Capability to segment specific audiences to streamline communications based on supporter suppressions, specific interests, and prior engagements.
- III. Provide comprehensive communications analytics and reporting including but not limited to open rates, click rates, engagement interactions, and bounce and unsubscribe management.
- IV. Ability for audience to utilize targeted action and click-to-call tools for advocacy campaigns to decision-makers, regulation dockets, and custom targets. Targets should be able to automatically update with ZIP code.

4. Additional System and Support Considerations

- I. Comprehensive breakdown of the total cost for CRM implementation and ongoing maintenance.
- II. Availability and responsiveness of reliable software support.
- III. Seamless integration with external tools and platforms through direct services or third-party integrations to enhance efficiency and functionality, including but not limited to:
 - i. Payment Systems such as PayPal, Apple Pay, etc.
 - ii. Financial Management systems such as QuickBooks
 - iii. CRM Integrations such as Salesforce for seamless data sync
 - iv. Social Media links for Facebook, Instagram, LinkedIn, X, etc.

5. **Optional Criteria**

- I. Access to tools to improve and optimize grant management processes.
- II. Available integrations with Volunteer Management Portals to effectively manage volunteers.

Scope of Work

The selected vendor will be responsible for:

- **CRM Implementation:** Assistance with setup, configuration, and customization of the donor CRM, as needed.
- **Data Migration:** Assistance with data transfer from current systems (legacy CRMs, Excel) into the new platform, as needed.
- **Integration:** Support with connecting CRM with external systems tools such as financial and accounting systems.
- **Training & Support:** Provide training for staff and offer ongoing technical support.
- **Documentation:** Provide user guides and system documentation.

How to Submit a Proposal

To ensure a smooth and efficient evaluation process, please follow the instructions outlined below when submitting your proposal:

1. **Submission Deadline:** All proposals must be submitted by March 31, 2025. Late submissions will not be considered.
2. **Submission Method:** Proposals should be submitted via email to wvrivers@wvrivers.org
3. **Required Documents:** Please include the following documents with your submission:
 - RFP Proposal Cover Sheet (see last page)
 - Completed *Matrix for Proposal Submission* (see next page)
 - Project Plan with timeline and milestones
 - Cost breakdown
 - Client References
4. **Questions:** If you have any questions or need clarification on the RFP requirements, please contact wvrivers@wvrivers.org no later than March 24, 2025. We will respond to all inquiries by March 27, 2025.
5. **Evaluation Criteria:** Proposals will be evaluated based on criteria noted in Key Decision Drivers section, cost-effectiveness, implementation timeline, and post-implementation support and training.
6. **Notification of Decision:** All vendors will be notified of the outcome of the evaluation by May 9, 2025.

We look forward to receiving your proposal. Thank you for your interest in partnering with WV Rivers!

Matrix for Proposal Submission

Vendor and Company Information	Vendor Response
1. Contact: name, title, address, phone, email, website.	
2. Company status: year founded, private vs. public.	
3. Revenue and net income – current and prior year.	
4. Employee count: worldwide, US.	
5. Total customers: worldwide, U.S.	
6. Target user: revenue, user count, industry.	
7. Implementation Support: Specify Direct or Partner	
8. Current version; version release strategy.	
Pricing – Define the following components	Vendor Response
1. Software license for up to 10 users preferred.	
2. Implementation; indicate cost and services included. May be defined as a typical ratio of cost of implementation to software cost	
3. Annual maintenance – % and total \$ for 5 years.	
4. Subscription hosting fees, if applicable.	
5. Training and creation of manuals	
6. Other - Indicate other components required and cost.	
Technology Platform and Integration	Vendor Response
1. Hosted solution heavily preferred (Remote access and integration with certain cloud solutions)	
2. Remote support services (i.e., database table updates, upgrades, integration support, troubleshooting, etc.)	
3. Support for synchronization to mobile devices, including but not limited to laptops and mobile phones	
4. Integration with social media platforms - Facebook, Instagram, LinkedIn, X, etc.	
5. Integration with financial institution(s), payment system(s) and other external tools.	
Campaign and Communications	Vendor Response
1. Ability to easily see all relevant touches with any supporter (engagement history, meetings, events scheduled to attend, previous events attended, participation in programs, etc.)	
2. Project/ Events: Track expenses, materials, staff assignments, tasks, event signups, outreach, etc.	
3. Create targeted actions based on locality, elected official(s), and other custom targets.	
4. User-defined fields w/ ability to use in queries/reports, with drill-down navigation.	
4. User-configurable menus, fields, screens, dashboards, and workspaces.	
7. Rules-based workflow, triggers, messaging, alerts.	

8. Targeted Emails, Texting, Events, and Form Creation	
Donor Management	Vendor Response
1. Adding, editing, and tracking donations	
2. Managing donor info and preferences	
3. Prospecting and suggested gift amounts	
4. Reporting and Querying	
6. Mail Merge	
7. Online Fundraising Campaigns	
General Query and Reporting	Vendor Response
1. Flexible and user-level query and reporting options and tools with custom access to and across all fields in the database. Ability to filter and summarize data.	

REQUEST FOR PROPOSALS (RFP) Cover Sheet

RFP Title: CRM (Customer Relationship Management) Solution

Issue Date: March 1, 2025

Proposal Due Date: March 31, 2025

Bidder Contact Information:

Name: _____

Title: _____

Company Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Acknowledgment and Understanding:

By signing below, I acknowledge that I have read and understand the terms and conditions outlined in this Request for Proposals (RFP).

Disclaimers:

WV Rivers is under no obligation to accept any proposal submitted and reserves the right to reject any or all proposals at its sole discretion without providing any justification.

WV Rivers reserves the right to amend, modify, or cancel this RFP at any time and for any reason without liability.

Respondents shall bear all costs associated with the preparation and submission of their proposals. WV Rivers will not reimburse any costs incurred.

All materials submitted in response to this RFP will be treated as confidential. However, WV Rivers reserves the right to disclose any information as required by law.

This RFP does not constitute an offer to contract and does not create any obligation on the part of WV Rivers to enter into an agreement.

Authorized Representative:

Name: _____

Title: _____

Signature: _____

Date: _____

For WV Rivers Use Only:

Proposal Received By: _____

Date Received: _____