logo.png

Jackson River Proposal

Presented to



August 2nd, 2013

# Table of Contents

[Executive Summary 1](#_Toc363157842)

[AIUSA’s Springboard Project 2](#_Toc363157845)

[Project Milestones and Budget 4](#_Toc363157849)

[AIUSA Requirements 5](#_Toc363157853)

[Springboard - Modern Fundraising and Marketing 25](#_Toc363157854)

[Our Process 28](#_Toc363157863)

[Appendix A: About Jackson River 31](#_Toc363157865)

[Appendix B: Selected Client List 33](#_Toc363157876)

[Appendix C: Our Capabilities 34](#_Toc363157877)

# Executive Summary

We are excited to present Amnesty International, USA (AIUSA), with this proposal for Springboard. Springboard is modern, robust, and solves problems for some of the largest national organizations that possess a need, *and desire*, to optimize their fundraising, advocacy and marketing efforts. We began developing Springboard five years ago, because we observed many of our clients experiencing limitations with all-in-one solutions like Convio and Sphere, most notably: email deliverability and throughput, lack of control over user experience, and lack of visibility into and ability to act on critical marketing data.

## What We’re Proposing

Jackson River proposes that AIUSA adopt Springboard for online marketing, fundraising and advocacy. Springboard is a best-of-breed system built natively in the Drupal CMS, and fully integrated with Salesforce.com CRM and industry-leading email marketing and automation systems. Additionally, we are recommending Silverpop for email marketing. Silverpop is an Email Service Provider that is natively integrated with the Salesforce.com CRM.

We believe that a best-of-breed solution will provide AIUSA with unique advantages over a single online fundraising and marketing solution. With Springboard you get world class fundraising tools, a robust and scalable CRM platform, and sophisticated email marketing and marketing automation tools – all seamlessly integrated by industry experts who understand the needs of national and international, enterprise-scale nonprofits.

## What’s In Our Proposal

Within this proposal we will address AIUSA’s specific requirements and how they translate from a single software solution to a best-of-breed model, and we will provide more information on the features, benefits, and architecture of Springboard. We welcome the opportunity to discuss Springboard in more detail, and to provide a demonstration of the power that comes with a best-of-breed approach, developed by industry experts and adopted by the nonprofit organizations with the most innovative online strategies.

If you have any questions or comments, please feel free to contact us directly.

Sincerely,

|  |  |
| --- | --- |
| Tom Williamson, Founder and CEO  [tom.williamson@jacksonriver.com](mailto:tom.williamson@jacksonriver.com)  202.588.5641 | TJ Griffin, Founder  [tj.griffin@jacksonriver.com](mailto:tj.griffin@jacksonriver.com)  512.296.0127 |

# AIUSA’s Springboard Project

We believe that Springboard meets the technical requirements presented by AIUSA and have addressed each of your specific requirements in the next section. Beyond features, Springboard is the right platform to support the evolving goals of your ambitious online strategy. Springboard’s power lies in its core set of advanced features, such as integrated multivariate testing and social analytics. Springboard’s sophistication lies in its ability to be rapidly extended to meet new requirements as strategic needs evolve. Product enhancements come directly from our clients and our internal team, enabling our clients to enjoy the benefits of a fully supported software platform without sacrificing rapid iteration and innovation.

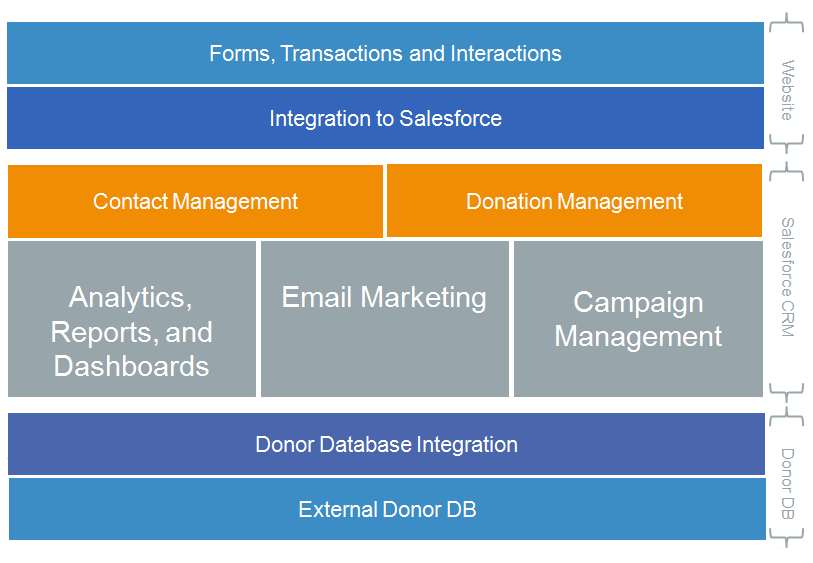
AIUSA has partnered with Jackson River since the summer of 2010, when we first started the process of developing your Drupal website. Since then, we have created a strong foundation of collaboration, which we hope to build upon as you consider adopting Springboard into your online marketing toolset. Springboard is natively built with Drupal, which solves AIUSA’s CMS integration issues and provides a content authoring experience that will be familiar to many at the organization. If chosen, Jackson River will not only support AIUSA’s organizational website, but also the fundraising platform, CRM, email marketing system, and any integrations AIUSA chooses to implement.

## Project Approach

The timeline outlined in the RFP is aggressive, but feasible. We work well under pressure, and with a December 1st launch rapidly approaching, we will need to dive in quickly with the AIUSA team to ensure a smooth rollout. Our recommendation is to implement the project in phases, the first of which would focus on Springboard platform implementation and data migration. Future phases would include integration and customization to the platform based on discovery. We have included suggested phases and deliverables, based on our current understanding of your prioritized needs. During the initial project planning and discovery phase of our work together, we would finalize the timeline, deliverables, and phases needed to ensure a smooth transition.

## Springboard Architecture

Our product architecture layers the Springboard-powered website content and forms on top of Salesforce, which in turn integrates with your external donor database:



For AIUSA, Jackson River would maintain the existing Drupal 6 website in this instance, and add a second Drupal 7 instance which contained all the Springboard code. The two would share a consistent look and feel, using Drupal’s theme and page wrapper system. The constituent experience would also be seamless, as visitors move between the AIUSA content site and the AIUSA Springboard content.

## PCI Compliant Hosting

Springboard as a platform is PCI compliant and security hardened by leading security experts. In order to provide an end-to-end PCI compliant solution, you will either need to work with your host to establish a PCI compliant hosting environment, or you can host your Springboard instance in our environment. As with other aspects of Springboard, you have choices, and we will assist in guiding you to the right choice given your needs and goals.

# Project Milestones and Budget

### Project Timeline

We recommend splitting this project into two phases. The first phase would be focused on data migration, platform implementation and core features. The second phase would begin after the 12/1 launch and be focused on customization and integration.

|  |  |  |
| --- | --- | --- |
| **Task** | **Begin** | **End** |
| Discovery | 9/1/2013 | 9/30/2013 |
| Phase 1 | 10/1/2013 | 11/30/2013 |
| Launch | 12/1/2013 | 12/1/2013 |
| Phase 2 | 12/2/2013 | TBD |
|  |  |  |

### Implementation Estimate

Our current implementation estimate is for Phase 1 only. We would require a discovery period in order to establish the scope of integration and customization required to meet AIUSA’s core needs.

|  |  |  |
| --- | --- | --- |
| **Task** | **Hours** | **Cost** |
| Discovery | 50 | $10,000 |
| Project and Account Management | 182 | $32,450 |
| Springboard Implementation | 150 | $26,250 |
| Salesforce Implementation | 144 | $25,200 |
| Data Migration | 118 | $20,650 |
| Launch | 32 | $5,600 |
| Total Implementation Cost | 676 | $120,150 |

### Estimated Ongoing Annual Costs

Below represents what we think the ongoing costs will look like. These costs may vary based on usage and mail volume.

|  |  |
| --- | --- |
| **Item** | **Cost** |
| Service and Support (40 hrs per month) | $72,000 |
| Email Marketing (60 M annual emails) | $90,000 |
| CRM | $12,000 |
| PCI Compliant Hosting | TBD\* |
| Advocacy | $20,000 |
| Total Ongoing Annual Costs | $194,000 |

\*Hosting costs depend on the approach AIUSA takes. You can leverage your current infrastructure with Hedgehog provided they will agree to PCI remediation. Alternatively, AIUSA may rely on our hosting platform.

# AIUSA Requirements

The following section provides responses to all requested requirements, and more information as appropriate.

Response Key:

* Native – can be mastered by a non-technical admin
* Possible – would require API or development effort
* Not Possible – not something that would be possible

Mailer Infrastructure: **Silverpop**

1. What is the largest client that uses your system by size of active subscribers and monthly volume of mail?

*One of Silverpop’s high-volume retail clients sends between 30 million and 50 million messages per month. Overall, current monthly volume across all Silverpop clients approaches 2.5 billion messages per month. Active subscriber numbers frequently fluctuate from client to client; however, Silverpop collectively manages 100 terabytes of data consisting of over 200 billion rows with the largest customer databases exceeding 100 million rows.*

1. At what speed do you deliver mail?

*Customers typically send approximately 3-5,000,000 messages per hour. This conservative figure takes into account several factors which can impact delivery speed, including anticipated concurrent usage, delivery size, and overall system performance.*

1. Do your clients share IP addresses for outgoing mail?

*No. Clients sending high volumes of email are afforded a dedicated IP address.*

1. How do you handle reputation management, deliverability issues with ISPs, blocking and throttling. Please be detailed and specific.

*During the provisioning process, a client’s dedicated IP address is white listed with the assistance of the New Client Care team. This enables the association of a unique IP address with a client and their domain(s) to allow for the various methods of authentication that Silverpop provides, as outlined below. Also during this time, a client may enable throttling via the Engage platform. The throttle setting can govern all messages that are sent from the client’s account, or can be used to throttle individual mailings to their own delivery rates.*

*Silverpop utilizes a variety of industry-accepted methods of email authentication. SPF and Sender ID are utilized to ensure that a sender's IP address is verified by the domain it was sent from. Domain Keys provide an encryption algorithm that verifies the identity of the sending IP address and correlates it with the domain it was sent from. Each of these authentication methods is established during the on-boarding process, and can be implemented on a custom domain managed by Silverpop or on the client's main domain(s) by insertion of text entry records provided by our network operations team. Feedback loops are established with the major ISPs that offer them (Yahoo, AOL, Hotmail/MSN, etc.) to establish and monitor the client's IP address' reputation with these ISPs. These feedback loops enable real-time processing of abuse complaints, bounce and delivery metrics. The results of these loops along with the metrics compiled from all other deliverability sources are reviewed with clients during regularly scheduled deliverability review sessions.*

*Once Silverpop has detected a block, we contact the blocking organization to request a block removal. Generally, most ISPs will need some form of confirmation regarding the reasons why a block should be removed. By utilizing the in-depth knowledge our Relationship Managers possess about each of their clients, we have been very successful in representing our clients in block situations and in many cases are able to clear the blocks within a matter of a few hours.*

1. Do you process hard bounces? How many bounces will unsubscribe a constituent from the email list?

*Rather than returning specific bounce codes, bounced emails are tracked by bounce type – hard or soft – for every e-mail campaign. This categorization is done based on SMTP error codes and message content. We track all bounced addresses so they can be reported, and optionally moved to a separate list or manually marked as undeliverable. Hard bounces may be marked as undeliverable immediately or according to a softer policy defined for the organization. Soft bounce retries are configurable (typical policy might specify to retry 3 times 24 hours apart). Only after all prescribed retries have been exhausted is the message considered "bounced".*

Mailer Features: **Silverpop**

1. Describe the best practice in your system for subject-line and content testing for email blasts?

*The automated A/B Testing functionality in Engage supports testing of mailing Subject Lines, From Names and Content. Up to four choices can be tested for a selected mailing. The number of contacts to receive the test mailings can be set specified, along with the timeframe for the test. Winning criteria includes Unique Open Rate, Unique Click Rate, Unique Conversion Rate or Effective Rate. The winning mailing can be automatically sent to the remaining contacts, or notification of the results can be sent via email.*

1. Describe how clients customize email blasts. Can you personalize subject lines? Messages? From lines?

*All three can be personalized or made dynamic based on the constituent’s profile.*

* 1. Can you leverage content from a constituent’s profile only, or can you also pull in content from event/interaction records that do not appear at the profile level?

*Both profile and event/interaction records (aka behavior) for a constituent may exist together in a centralized database. This makes it easy to leverage both attribute types to drive unique content.*

* 1. Can you build logic statements based on a value in a constituent’s profile/engagement record to generate calculated or custom content (if this then that)?

*Yes. Conditional content is supported.*

* + 1. E.g.: If a user’s most recent contribution was between $5 and $50, then multiply that value x2, round to the nearest ten and insert into hyperlinked text in the body of a message)?

*In this model, the calculation would happen in Salesforce and be synched over in a profile field to the ESP. You can add custom fields and calculated fields to the contact object in the CRM and map that field to a corresponding field in the ESP. This process is all point and click (i.e. doesn’t require code to be deployed).*

* + 1. E.g.: If a constituent lives in Texas, add a custom lift note to the message

*Yes this is possible using conditional content based on constituent’s state and using the Engage Dynamic Content feature.*

1. Is there a “custom segment” upload feature? How does additional data get into the system?

*There are a variety of Salesforce tools that allow you to load data into the system, dedupe that data against existing records, associate records with campaigns, etc. These add-on tools are free and there are paid versions of similar tools that provide additional integration capabilities for longer-term integration projects. Additionally, some segments may be calculated automatically and not require an upload.*

1. Are you able to attach custom fields to constituent records? Are you able to attach custom fields to other types of data?

*You can create custom and calculated fields on any object in the CRM. You can also extend the database by creating additional objects.*

1. Do you have a WYSIWYG email editor?

*Yes.*

1. Can admins schedule sends or have recurring emails that send automatically?
   1. Can admins set specific times for recurring emails to be sent each day (E.g.: daily at 1:35pm local time, every Tuesday at 11am database time, etc)

*Yes. Standard users may also send emails if afforded the permission. Silverpop Engage allows users to send, schedule a send, send a test and automate a send. Additionally, the platform features Send Time Optimization, which analyzes recipient behavior on a rolling basis to predict the ideal email delivery time for each address on the mailing list. The system then individually delivers messages to recipients at the precise day and time they're most likely to be in their inboxes. As a result, Silverpop clients have seen a dramatic lift in open, click, order and conversion rates. For example, Mint.com saw a 200% increase in open rates when using Send Time Optimization.*

1. Describe how customers target their emails to certain constituents. Are their geographic targeting options available? How are custom groups made and selected for inclusion in mailing? Are there any “groups” that are auto-created based on actions constituents take in the system? Please provide screen shots of the search functionality. Is there functionality to make segments mutually exclusive and protect against sending duplicate messages?

*Silverpop has simplified the approach to targeting and constituent search through its sophisticated querying tool. For example, clients wishing to do geographic targeting may import zip codes, as well as latitudinal or longitudinal data, into a relational table. Along with this relational table data, actions such as “submitted a form” or “clicked link in email” may be used to more richly define a custom group. When additional constituents are imported and meet the defined criteria for the group, the query may be recalculated manually, or will be recalculated at time of send to include the most recent constituents. Conversely, as queries are mutually exclusive, criteria can be established using operators like “has” or “has not” to avoid sending duplicate messages. Below is a screenshot of a multi-criteria query that leverages profile, behavior and relational table data.*



CMS: **Springboard**

1. Describe your wrapper or templating system for front-facing web pages. Do you have version control for updates to pages? Do you have version control for forms?

*Springboard utilizes the Drupal theme engine and comes with a native responsive theme for mobile, tablet and desktop content. In addition to the core Drupal theme, there is a Page Wrapper system that makes it possible for users with knowledge of HTML/CSS to create new templates for use within Springboard.  
  
Page Wrappers are highly configurable and can be set to display based on user device, screen resolution, or even URL path for handling of specialized campaigns.*

*Versioning is supported for both Drupal themes and Page Wrappers. Tracking revisions on forms is not currently supported but is something that can be developed.*

1. File upload – Is there a file size limit to files that are uploaded? Where are files stored? Are files served over https, http, or both? Are you able to FTP to the file storage system? Is there another bulk interface to those files? Please provide a screenshot of the file management interface.

*There is not a file size limit for uploaded files. Files can be stored in Springboard, in the CRM and in Silverpop. File storage in Springboard is FTP accessible, or you can upload through the WYSIWYG editor and/or the file management UI. Each system has its own UI for handling files.*

1. Please list and describe briefly the types of actions and pages that can be set up with your system.

*Springboard is built natively within the Drupal CMS, so you can create unlimited types of pages, similar to AIUSA’s existing Drupal website. Forms typically created within Springboard include donation forms (sustainer, one time, honor/memorial, etc), petitions for advocacy, and email sign up forms. Springboard also allows you to generate new form types which can handle things like volunteer registration, events, surveys and more. Each form submission is connected to the contact that submitted it and tracked in the CRM. Different types of form submissions can be captured into a single CRM object or stored across many objects depending upon your needs.*

1. Are you able to shortcut to a petition, sign-up, or donation page?

*Yes! With Springboard, administrators can create marketing URLs. Additionally, Springboard can integrate with a URL shortening service such as bit.ly, or a custom AIUSA-specific short URL.*

1. What is the best practice for making all pages mobile friendly?

*Springboard can handle mobile in several ways:*

* *Our core theme and form layouts are responsive; all screen resolutions are natively supported.*
* *Springboard’s Page Wrapper system allows you to generate custom page wrappers that match your site’s theme. This page wrapper can be responsive and adjust based on resolution or device.*
* *Finally, if your site’s theme isn’t natively responsive, you have the ability to create multiple page wrappers and serve up specific wrappers on any page or form based on device and/or resolution. This is configurable globally and can be overridden at the page/form level.*

*In general, we recommend having a natively responsive site theme. If that is not possible (based on design or budget constraints), then serving up different wrappers per resolution would be the second best option.*

1. Please describe what testing features you have available for landing pages.

*Springboard has a native multivariate testing feature designed for fundraising and petition-specific campaigns. Unlike other systems which may track simple conversions, Springboard’s multivariate tool can also determine “winning forms” based on fundraising data such as average donation amount, % sustainers, and more. Additionally, Springboard is compatible for use with third-party multivariate testing systems such as Optimizely.*

Advocacy and Social

1. Describe the way your system works with social networks. Can any page have Twitter and Facebook share buttons? Are you able to customize share messages by page or constituent? Are you able to import your contacts to send share messages? Are shares credited to the constituent that took the action?

*Yes, any page can have Twitter and Facebook shares, and the message and appropriate network settings are configurable by page. Springboard integrates with AddThis, a free service which makes maintaining social shares much easier, and provides another level of analytics. AddThis does allow visitors using Gmail, Yahoo, AOL, and Hotmail to send directly to their contacts.*

*Most important, share activities, as well as the resulting conversions, are tracked back to the original sharer in Salesforce. This allows reporting on the most influential constituents for both fundraising and petitions.*

1. Do you have an “email congress” tool? What other levels of political geography do you support? Describe the user experience (and the admin experience) of emailing congress.

*Springboard natively supports petition collection, but does not support message-to-target type actions. For message-to-target functionality, Springboard integrates with the CQ Roll Call and/or Engaging Networks advocacy platforms. Actions are created within the advocacy platform and users take action on the provider site. Springboard handles syncing users and the resulting action responses into Salesforce for detailed reporting.*

1. Is there a “one-click” option for constituents to sign petitions? Are forms pre-filled for constituents when they land on action pages from emails?

*Springboard has a “one-click” petition signing feature for constituents who have previously taken action. This feature is currently being upgraded to the latest version of Springboard and would be available for AIUSA. Additionally, all Springboard forms (including donation forms) are pre-filled securely when originating from an email.*

1. Describe the best way to add customizations to your petition feature. What would be the best practice to add a custom leaderboard of available petitions, make on-the-fly suggestions to constituents for additional petitions to sign, or allow constituents to create their own petitions?

*The best way to customize will depend on the customization. For clients such as the ACLU, we have action count “thermometers” and leader board functionality.* [*Here is an example ACLU form with goals, social, and one-click*](https://www.aclu.org/secure/mothers-plea-stop-solitary-confinement-children?ms=web_acluaction_kirk_130321) *signing. (If the form is inaccessible, please note that it’s possible the ACLU may hit their goal and close out this action).*url: https://www.aclu.org/secure/mothers-plea-stop-solitary-confinement-children?ms=web\_acluaction\_kirk\_130321

*The International Fund for Animal Welfare has a completely different approach to their petition layout and features* [*as you can see here*](http://www.ifaw.org/united-states/get-involved/what-are-you-really-bringing-back-you-vacation)*.*url: http://www.ifaw.org/united-states/get-involved/what-are-you-really-bringing-back-you-vacation

*In terms of providing suggested follow-up actions, these can either be generated dynamically based on a set of rules or statically. We would want to explore the exact requirements with AIUSA.*

*Providing the ability for approved users to create their own petitions is a native feature of Drupal. We would want to work with AIUSA on what the user flow is so there would be some configuration and potentially some coding effort required depending on the requirements.*

1. Are you able to set goals and display goal counts and/or %-to-goal thermometers on constituent-facing pages? Do goals auto-update based on number of signers?

*Yes, and goals are also available for fundraising in addition to petition forms. You can see this in action on the ACLU Action Center and within their specific actions. (*[*http://www.aclu.org/action*](http://www.aclu.org/action))

*The presentation of the thermometer is fully customizable based on AIUSA’s design needs.*

1. Can constituents create their own personal versions of a petition page and see the # of actions they have contributed through their own promotions, as well as how it ties in to the broader organization’s petition goal?

*Yes, this is possible but would require some configuration or possible coding, depending on requirements. A similar example would be our DIY Fundraising site built for the International Rescue Committee (*[*http://diy.rescue.org*](http://diy.rescue.org)*)*

Events

1. Are both constituents and admins able to create events?

*Similar to petitions, events can be created by constituents. However, there would be configuration and possibly some coding required based on requirements.*

1. Describe how an event host or admin recruits friends to come to their event.

*Springboard as a platform doesn’t limit to any one way to recruit friends. We can use the simple “email” or social sharing features, or implement more sophisticated systems similar to personal fundraising pages. The costs vary and will depend on final requirements.*

1. Can nearby event details be put into emails? Subject lines?

*Yes.*

1. Are you able to have “ticketed events” or otherwise associate events with donations? Please describe the relationship between events and donations.

*Within Springboard you can have paid events, or donation-based events .In this case, the event registration is the donation and is tracked differently within Salesforce based on how we want to handle reporting and management of the event. There is not “one way” to do this in Springboard, so this is something we would discuss during discovery and tailor according to your organizational model for handling events.*

1. How can a host or admin manage the list of attendees for an event?

*All event registrants are tracked within Salesforce and integrated with the email tool, so there are a variety of management options available. From reporting, to messaging, to updating a user’s registration status, all of these are standard. Additional requirements may involve configuration or customization.*

1. Are hosts or attendees able to post pictures or messages to the page of an event?

*Drupal provides the ability for end users to submit content to the system, including photos. This content can then be automatically used for innovative displays and engagement tactics, such as auto-creating photo galleries for each event or per user. Another example is to collect photos via email and have them published to the site, which creates for a better user experience from mobile devices which feature built-in photo capabilities. The latter option would involve some coordination for handling of email addresses, but is technically available.*

Integration

1. SMS – Do you provide SMS services? Do you have existing integrations with any mobile providers? If so, please describe the integration and the vendor.

*Springboard provides SMS integration with several third-party services, including Mobile Giving and Twilio. Additionally, Silverpop offers SMS capabilities. In order to price SMS we would need to discuss how you plan to use SMS, as well as expected volume. This pricing estimate does not include SMS services via Silverpop at this time, but can definitely be modified to include this.*

1. Integration with a 3rd party “database of record” is a requirement. Propose how you would accomplish this. Would you push messages to a queue for the 3rd party to process? Or provide APIs for others to access data in your system? Have you ever worked with the ROI data management system?

*We have integrated Springboard with several donor databases, including Raiser’s Edge, PIDI, and Team Approach. We have not had the opportunity to work with ROI on an integration, so we contacted Matthew Rosen from ROI on integration options. Through discussions with Matthew he did confirm they have an API available for integrations, but also noted that often they prefer to do the integration with the other system.*

*We are happy to work in conjunction with them on integrating Salesforce with ROI, but we would need to work with AIUSA to decide who would own that element of the project. Integrations can range from relatively simple to quite complex, based on many factors. This aspect of the project would require additional discovery in order to estimate.*

Donations

1. Does your system support constituents making donations online?

*Yes.*

1. Does your system autofill donation form fields based on hyperlinks in email, cookie/browser data, or other means?

*Springboard can autofill donation forms (as well as non-fundraising forms) with a constituent’s profile when originating from a link in an email. We use this same method of autofilling to also deliver customized gift strings to the constituent based on the client’s gift string calculations. Additionally, users who authenticate and choose to be remembered will also have autofilled forms.*

1. What payment processors are supported “out-of-the-box”?

*Out of the box, we support Litle, Authorize.net, PayPal Payflow Pro, and Sage Payment Solutions. However, since Springboard is powered by Drupal’s Commerce system we can, with very little customization, support over 100 additional gateways. If AIUSA requires a gateway that is not supported by Commerce, we can develop a new payment gateway module for that system on a time and materials basis.*

1. Can you manage recurring donors, or refund and change donations through your interface?

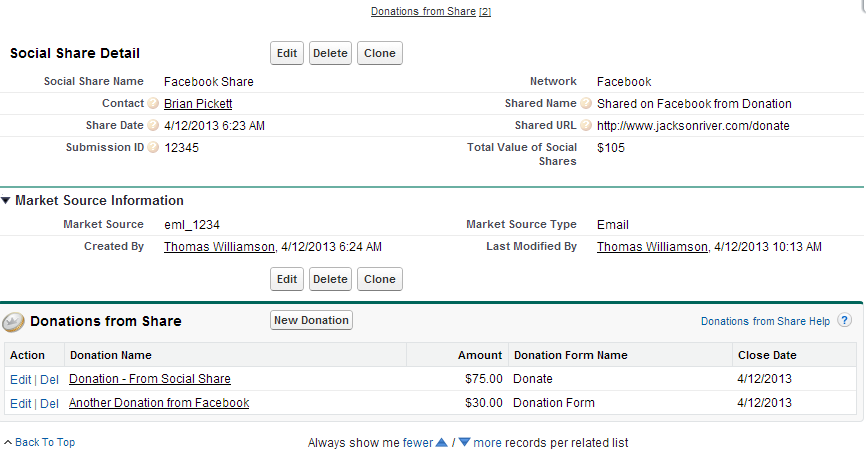
*Yes, Springboard provides support for recurring (sustainer) donations as well as refunds and adjustments. Additionally, we have a sustainer management interface designed for donors to manage their own monthly gifts.*

1. Do you support monthly donations? Are recurring donations stored in the payment processor’s systems, or is the credit card stored in your system and sent for processing every month?

*Springboard supports monthly donations and even has enhanced features for sustainers such as our sustainer upsell module. For security, we do not store the credit card numbers in our system and instead use tokens from the payment gateways to charge future gifts. However, the recurring gift schedules are maintained by Springboard where they can be managed by Administrators or the donors themselves (including upgrading/downgrading gifts, cancelling gifts and renewing credit cards).*

1. How is social media sharing integrated into your donation experience?

*Springboard’s social module allows administrators to choose which social networks are enabled on a form’s thank-you page and can either use system-wide default share content or can set content specific to each form. Once a user “shares,” we store that share activity on the user’s profile and we then track any donations that are generated from that share. This enables powerful influencer reports as well as share ROI metrics.*

**

*Social Share Tracking within Salesforce*

1. Does your system support custom form content based on constituent segments? E.g., how can we change language from “join” to “renew” based on the value found in a profile field?

*This is not a standard feature currently, but is something we could develop as an enhancement to Springboard.*

1. How are donation pages customized? Are we able to change the information that appears on a donation page? Can we make the donation flow into multiple steps (pages)?

*Administrators are able to change the overall layout (for example, one column vs. two column), page wrappers, content and all form fields for any given form. Essentially administrators have full control over each donation form, but this can also be limited based on permissions.*

*In addition to out of the box customizations, we have the ability to extend the capabilities through unique donation form layouts which are stored in code and available to administrators through a select box. The form layout provides you the ability to have a variety of reusable unique layouts without having to rewrite custom CSS or unique markup each time you want to generate a similar experience. Form layouts also provide you the ability to create multi-step style forms.  
  
 Within a form layout, administrators are able to move fields around, add new fields, modify field labels and insert markup. Additional form layouts can be generated by us or by your developers.*

*Similarly, the page wrapper system allows you to modify the chrome of the page. If you have a campaign with unique look and feel, you are able to generate a page wrapper that overrides your base theme or default wrapper settings. Page wrappers are able to be generated by administrators and support custom markup, CSS and JavaScript.*

1. How does a constituent manage their recurring contribution in your system?

*Sustainers have an account in the system and are able to log in and update their recurring contribution amount, billing information, or cancel sustaining gifts. However, we can limit these features as needed, such as if AIUSA didn’t want users to be able to cancel their donations.*

1. Can you customize “thank you” emails for both recurring and one-time contributions?

*Confirmation emails are fully customizable by the administrator on a form by form basis. The email content itself allows you to insert merge fields based on a donor’s gift in the body of the email. Additionally, email templates are able to be created with default content which provides a base set of content for administrators to begin from.*

1. Can you support memorial or tribute gifts?

*Yes, we can support unlimited types of forms. Form types can come predefined with certain fields so that you always begin with the form fields you need for a type, including tribute gift information. We can also send specific emails to other recipients notifying them of an honor or memorial gift. This is configurable per form by administrators.*

1. Can the ask string be customized based on the donor’s giving history?

*Yes. Springboard can support multiple gift strings so that fundraisers may have different gift strings for different types of appeals. For example, join vs. renew campaigns, one time vs. sustainer appeals, etc. Gift strings can be generated via ROI and pushed to Salesforce via an integration or file upload, or Salesforce can automatically calculate the strings based on user-defined formulas.*

1. Do you have a “saved payment” information feature?

*We currently have a saved payment feature called Quick Donate. This feature is currently being upgraded and will be available to all Springboard clients soon.*

1. Can multiple primary domains be configured to accept donations (can we have microsites that accept donations)?

*Springboard can support having multiple domains, along as we have an SSL certificate for each domain. Springboard can accept donations through any of the microsites and can have different source or fund codes as necessary for tracking and reporting.*

1. Are you able to attribute the donation to a specific person (“referred by”)?

*This is something that we do inherently with our social tracking system; however, providing this as an option to end users would require some development (but is possible).*

1. Are you able to attribute donations to a donor’s original source when they signed up to the list?

*Yes. Springboard stores the original source and last seen source (this is configurable) so we can run gift reports based on a contact’s original source. Additionally, with some configuration we could tag donations with the donor’s original source code. The choice of approach would be based on AIUSA’s reporting goals.  
  
Springboard’s source code system is extremely robust, allowing you to track multiple source codes simultaneously as well as capture things like User Agent, Search Terms and Search Engine, Session Referrer and Page Referrer and more. All of this data is captured on both transaction and donor records. For donors, we persist the original source data on creation.*

Are you able to track donations based on a source that is passed through the URL?

*Yes. Springboard’s market source module is designed for this, and has some features for variable persistence of sources that are quite powerful.*

Are you able to track donations to the mailing it came from without using a source?

*Yes. Silverpop can be configured to automatically append the email campaign id and campaign name which generated the transaction and interaction. These items will be captured on both the transaction (financial or otherwise) and contact record when they are created.*

1. Do you have an API available that allows “offline transactions” to be sent to your system? Does it require your UserID or does the API handle matching to existing records?

*Springboard has an offline caging system, which is currently being upgraded and will be available to all Springboard clients soon .When caging you can look up a user or search by their Donor Id (which typically we capture from the Donor Database).*

Analytics and Reporting

1. Describe best practices in your system for using data and analytics to alter strategies across email, web, social and other mediums.

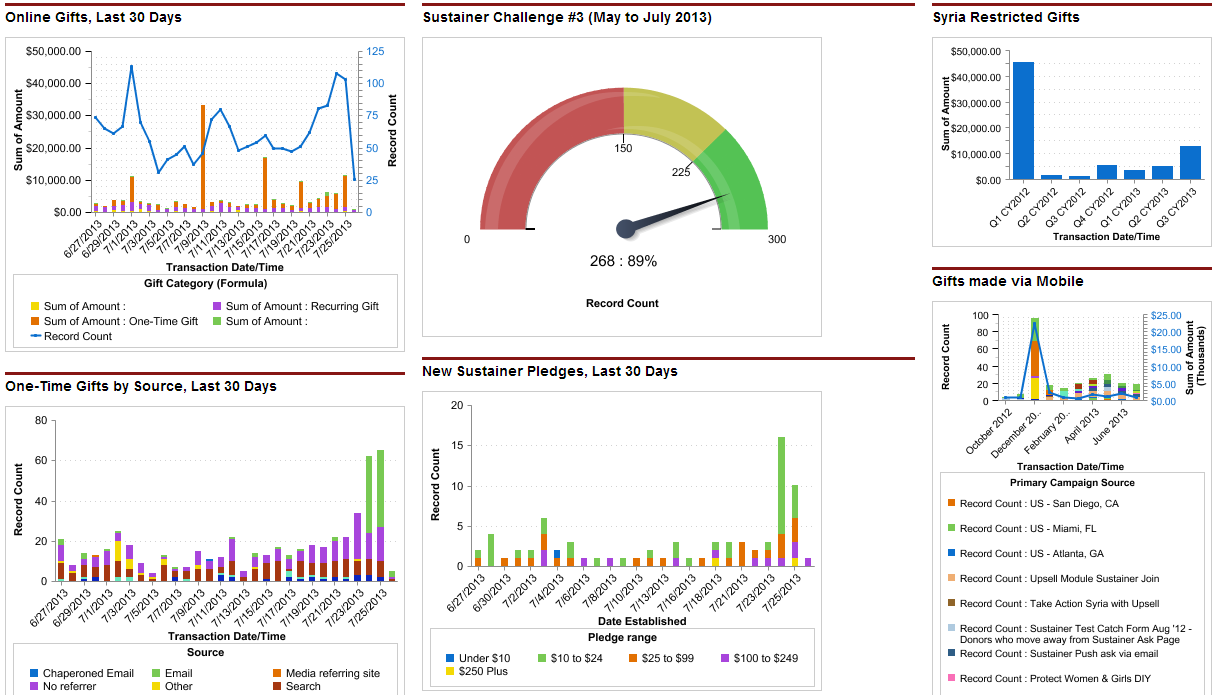
*Springboard provides comprehensive reporting on donations, actions, and registrations across organic, email, social, and other mediums. Tracking this information is critical in providing insight into what is working and what is not, so that marketers and fundraisers know where to focus their efforts. During a demonstration we can show AIUSA how our clients are using data generated from Springboard to significantly impact their marketing performance.*

1. Describe how your system “sources” actions and signups. Are new constituent signups “sourced” to the action that added them to the list?

*Yes. How we configure this is flexible, as every organization has different needs for how sources are determined. In general, our source coding system works the same way for donations as it does for actions. All source data is captured on both the interaction and the contact record, where it can be used to determine the original source of a contact.*

1. Is there a reporting display for administrators? Please provide screen shots. Describe the best practice for creating reports for admin users of donations broken down by specific email.

*Salesforce has a full report creation and display UI for administrators. Dashboards can group reports together and provide nice graphical reporting elements for senior staff and internal presentations. Administrators can create these without any technical knowledge.*



*Salesforce Source Dashboard*

1. Is there full query access to all data elements? How is that achieved?

*Yes, you can query on all available fields within the Salesforce report UI (based on permissions).Additionally, there are third-party free tools for advanced querying available to technical admins.*

1. How can admin users export data? What data fields and formats are available to export?

*Administrators can export the results of reports into Excel and CSV formats. Administrators can schedule full backups of all data on a scheduled basis within the Salesforce instance. All Salesforce data is available via the API and Salesforce provides free utilities to export any and all data anytime you desire. There are also paid third-party tools available that allow you to back up your full Salesforce relational data into access, SQL Server, or MySQL relational database formats. Ultimately, all data within Salesforce is accessible through a variety of methods at any time to the client.*

1. Is there and import feature? Are you able to import actions in addition to simply constituents? When uploading constituents, what fields are used to match records?

*Yes, there are several very powerful import tools. As mentioned above, there are data management utilities provided for free to upload and update data as needed. You can upload into any Salesforce table, including actions, contacts, donations, or any other object for which the user has permissions. Fields for matching records are configurable and IDs from external systems can be set as foreign keys for uploading/updating purposes. Common ones we use are Salesforce ID, email address, donor database ID or other external system unique identifier. There are also third-party fuzzy matching tools for more complex matches on things like Last name + zip code.*

Onboarding, Support, Pricing

1. What is the typical arrangement for onboarding new clients? Do you migrate existing forms and pages into your system or does the client do that work? Do you handle migration of existing constituent data? Actions? Donations? Opens/clicks?

*We have provided a detailed description of our onboarding and implementation work below, in a section called* [*Our Process*](#_Appendix_D:_Our)*. To your specific questions, we work with the client to determine how many forms and pages you want us to migrate into Springboard. We typically recommend that we set up 5-8 core forms, and then our clients tend to migrate the remaining forms. This allows your team to get hands-on experience with creating and managing forms during the implementation process, which facilitates you’re hitting the ground running post launch. If desired, we can fully migrate all of your forms, but this will increase the scope of our services.*

*Additionally we typically migrate all of the data listed above, working with the client to define which data will be most valuable. For example, if all contributions are in ROI and you don’t need 5 years’ worth of gifts in two places, that is an area where we might determine together to only bring in recent gifts or fundraising summary data, via the integration. This largely depends on whether your marketing strategy relies on having that data fully present in Salesforce.*

*Generally speaking, the scope of the data migration and much of the data mapping is determined collaboratively between you and your Jackson River team during discovery.*

1. Describe your typical ongoing support relationship with your clients. What is considered in scope for support and what is out of scope? Is there a project manager assigned to every account?

*We fully support our Springboard clients post launch and offer retainer packages for ongoing support, development, and consulting services. We support the entire technology stack, all integrations, and users, and are there to work with any third-party vendors, too. Enterprise clients such as AIUSA always have a dedicated Jackson River account team, including a project manager and developers.*

*We have included more information on our support services in later sections, but we take ongoing services seriously. The continuity of relationship and our long-term investment in your success are the major reasons why our clients continue to work with us.*

1. How much training do you provide for new users of the system?

*We train clients on both Springboard and Salesforce (the email providers handle training on sending emails).Training is a professional service, and AIUSA can have as many as you like, but we generally provide 2-4 trainings depending on your number of administrators and job functions. More on our approach to training is below in the* [*Our Process*](#_Appendix_D:_Our) *section.*

1. How do you handle customization or change requests?

*We fully expect clients to want to customize some aspect of Springboard. We work with clients to understand the request, come up with possible solutions, and then move into estimation and implementation. We can scope new features as part of our ongoing support agreement. If a piece of development is large enough to necessitate a new agreement, we will execute a Statement of Work (SOW) for a new project.*

1. Describe your pricing model you would offer AIUSA.Is it based on the number of active constituents? The number of emails sent?

*Pricing works a bit differently with Springboard, because it is a best-of-breed tool rather than an all-in-one tool. Here is a summary of key vendors and pricing models:*

***Jackson River (Springboard)****: AIUSA will have one-time implementation and migration fees with Jackson River, an ongoing monthly support agreement, and possibly a hosting fee, should you choose to host within our PCI-compliant infrastructure. Additionally, you may have one-off projects in the future which will be scoped and billed along with support.*

***Salesforce (CRM)****: Salesforce will charge fees for administrators, data storage, training, and API calls as necessary. We have included in our pricing table rough numbers on what to expect from Salesforce.*

***Silverpop (Email Service Provider)****: Most email service providers price based on email volume, but some price based on list size. The pricing provided is based on email volume of 60 million emails per year provided by AIUSA.*

***Message to Target Advocacy****: Most of the message to target providers have annual, quarterly, or monthly payment fees and are based on volume or data sets involved (federal, state, local, etc).*

***Other:*** *Note that depending on AIUSA’s approach, there may be other providers such as website hosting, payment gateways, etc., which are not accounted for here.*

1. What SLAs can you commit to for uptime, deliverability, and send speed?

*For clients hosting within the Jackson River PCI-compliant hosting infrastructure, our SLA is 99.5% uptime. Silverpop can provide more information directly to AIUSA for the email system.*

Security, Permissioning, Development

1. Describe your CRM release cycle, product roadmap, and process for prioritizing new features.

*Salesforce manages the CRM release cycle, but has an amazing reputation and track record in this regard. More information on Salesforce releases can be found here:* [*http://www.salesforce.com/customer-resources/releases/*](http://www.salesforce.com/customer-resources/releases/)

1. How many admin accounts can an organization use? What are the options for setting up custom permissions and workflow steps based on a user’s responsibility level?

*Organizations can have unlimited administrative accounts in Springboard, Salesforce and Silverpop, and all systems support different levels of workflows and access to data or features. We would want to better understand the AIUSA workflows to make sure the model in all systems is a good match for your practices.*

1. Do you undergo regular network scans? What level of PCI compliance have you achieved?

*Within Jackson River’s hosting infrastructure, we undergo regular network scans and maintain PCI compliance for our environment. Clients that are hosting on their own infrastructure or directly with a third-party vendor are responsible for running scans, and Jackson River will remediate results on the application level.PCI Level is determined by transaction volume and the majority of clients are Level 2 or 3.*

1. What is your hosting environment? Do you have 24/7 on-call systems administrators?

*We manage a private cloud in partnership with our hosting provider. Our hosting provider has 24/7 system administrators on site, and we provide 24/7 monitoring of the Springboard application and on-call engineers for critical issue resolution.*

1. Please describe your backup procedures

*Full backups of Jackson River’s PCI compliant hosting Springboard infrastructure are performed nightly. We maintain nightly backups for 30 days and monthly backups for 3 months. Salesforce data backups can be scheduled to run by administrators on a regular schedule as well.*

1. Describe type of user and role permissioning available.

*Both Springboard and Salesforce allow for creating custom user roles, each with granular level of access to data and features. Should custom permissions within Springboard be necessary, that may require some development.*

1. Are all transmissions of sensitive data secure? Please describe.

*All transmitted data between Springboard and necessary systems, including credit card payment systems and Salesforce, are done over secure SSL connections. Additionally, when autofilling forms from emails, we encrypt the user data using AES-256 encryption to protect the data during transmission over email.*

Other

Please feel free to include any other features that you think you would be relevant to Amnesty’s work.

*We hope this paints a picture of the features and possibilities that come with adopting Springboard. We have provided more information on working with Springboard and with Jackson River in the sections to follow, and would welcome a chance to demonstrate our suite of tools in action.*

# Springboard - Modern Fundraising and Marketing

Back in 2008, we looked around the nonprofit software landscape and saw too many online marketing platforms that were antiquated, inflexible, and limited an organization’s online strategy. We imagined an opportunity to uniquely serve nonprofits by bringing together the world’s most powerful open, low-cost, and customizable CMS (content management system) and CRM(constituent relationship management) technologies.

With those goals in mind, we developed Springboard, a best-of-breed suite of online marketing and fundraising tools that are precisely tailored to meet nonprofits’ distinctive needs, practices, and goals. Springboard builds upon the flexibility of Drupal’s a CMS and natively, seamlessly integrates with Salesforce’s world-class CRM offering.

Because we are technologists who think like marketers, Springboard places social, mobile and analytics at its core, along with sophisticated new concepts in online engagement and fundraising. Because we have nonprofit backgrounds, Springboard was designed from the ground up to be flexible, modular, easy to use, and able to accommodate even the most complex of requirements.

The result? A powerful, versatile, affordable toolset used by some of the world’s most critical causes to achieve their missions–like raising money to respond to global humanitarian crises, empowering women to run for office, and catalyzing environmental action to save the planet.

## Advanced Donations & Engagement

Whether you’re publishing a quick campaign around a time-sensitive issue or experimenting with new ways to engage your supporters, Springboard forms scale to meet your needs.

|  |  |  |
| --- | --- | --- |
| **Unlimited Form Types** Choose from one-time, sustainer, honor and memorial forms, or go completely unique. | **Quick Donate** Facilitate one-step donations by allowing supporters to save their payment information for the future. | **Sustainer Upsell** Offer point-of-sale upsell opportunities to convert one-time donors into long-term sustainers. |
| **Personalized Giving** Make donations simple and increase your ask effectiveness by auto-populating a donor’s information. | **Dynamic Ask Strings** Personalize the donor experience and drive higher-value gifts by displaying gift levels that match a donor’s past behavior. | **Donor Account Center** Allow donors to easily update their sustainer information and see their gift history through an easy-to-navigate account management center. |

## Marketing& Analytics

Springboard doesn't merely power your online presence; it captures information that enables organizations to measure the success of their online marketing efforts.

|  |  |  |
| --- | --- | --- |
| **Source Codes** Track campaign performance through unlimited, highly configurable source codes, including persistence controls for multi-step conversion campaigns. | **Web Analytics** Understand in detail your supporters’ behavior via built-in web analytics integration with whatever tools you choose, including Google Analytics and advanced tracking of goals, funnels, and Ecommerce activity for transactions. | **Search Engine Optimization** Tailor your content to maximize findability and drive organic traffic with easy-to-track search engine and keyword set up. |

## Social Integration

Springboard helps you move beyond basic social media communications to maximize your success with social engagement. Through our integration with the AddThis social bookmarking service, organizations can easily facilitate viral marketing and closely track social shares in Salesforce.

|  |  |  |
| --- | --- | --- |
| **Social Sharing** Enable your supporters to easily share your content, campaigns, and key actions with their networks. | **Conversion Tracking** Map the activity that results from shares to identify how viral marketing results in conversion according to your key goals. | **Influencer Identification** Track how individuals recruit other supporters and cultivate key influencers to maximize conversion. |

## Multivariate Testing

Because we consider testing to be an essential part of running any campaign, Springboard’s built-in Multivariate Testing capabilities make data-driven optimization simple. When creating a form, you can easily establish variants and structure a test to measure the effectiveness of content, layout, and design. Our testing module allows you to set performance targets, measure success against multiple criteria, and ultimately promote the winning form.

## Responsive Forms for Mobile, Tablet, and Desktop

Springboard interactions are natively optimized for mobile, tablet, and PC visitors. Our forms utilize responsive design, allowing them to adjust to your user’s device – always delivering the best possible supporter experience.

## Secure, Cloud-Based, & Portable

Springboard is all about flexibility. Because it’s based in the cloud, Springboard provides the same reliable experience and performance to all of your staff, affiliates, and volunteers, wherever your organization is based – whether in a centralized office or scattered around the globe. Your organization can choose to host Springboard with your own webhost, or host it in the cloud via our PCI-compliant infrastructure. And, because Springboard is portable, you can change your mind down the line.

## Easy Integration

Like your Jackson River staff, Springboard plays well with others. Springboard was built to integrate with other technology platforms, including other CRMs. While our Springboard clients use Salesforce for online marketing and fundraising, most also maintain a direct mail donor database and a number of other systems that need to converse with ease.

|  |  |  |  |
| --- | --- | --- | --- |
| **Other CMSes** Whether you choose Drupal, WordPress, or another CMS, Springboard forms always look, feel, and act like a part of your broader web presence. | **Email Service Providers** Springboard is easily configurable to track interactions across channels, including email. We have built-in integrations with industry- leading ESPs like Silverpop, Eloqua, and ExactTarget. | | **Online Advocacy Tools**  To enhance Springboard’s petition system we also integrate with message-to-target systems, including Capitol Advantage and Engaging Networks. |
| **Analytics & Testing Tools** While we think our native Google Analytics integration and multivariate testing features rock, Springboard also plays well with other testing and tracking platforms like KISSmetrics, Optimizely, or CoreMetrics. | | **Other Databases** While Salesforce can accommodate just about every data need, many organizations use direct mail donor databases, “offline databases” or data warehouses. No matter the system, Springboard can push and pull data between one or multiple systems to enhance analytics and performance. | |

## Dynamic & Expansive

We draw our inspiration for Springboard from the rapidly-changing world of digital engagement, from interesting for-profit approaches and most importantly, from the good ideas of our nonprofit clients. We feed what we learn back into our product roadmap, which is what has already made Springboard such an exceptional offering in features, performance, and scalability.

Springboard’s most important feature set, though, is that it grows and adapts with you. Rather than your technology platform dictating your marketing strategy, your strategy drives how Springboard gets built – both in its initial setup and configuration for your organization, and as your needs evolve over time.

# Our Process

Although specific activities and deliverables will depend on the nature of the project, we always work in a highly collaborative fashion with our clients to ensure that we’re delivering what you need, when you need it, and within your organization’s budget. Regardless of scale or scope, all of our projects follow the same comprehensive methodology:

Our first order of business is to embed ourselves in your organization – to learn about who your team is, how you work, the breadth of what you’re trying to accomplish, and how we can best align ourselves with your goals. Once we’re thinking like members of your team, we design both a project approach and a technical solution.

**Discover & Design**

The **project approach** encompasses the working plan that will guide our joint team from conception to launch, including a finalized budget and scope; detailed project timeline; clearly defined areas of responsibility; and recommended communication, sharing, and tracking tools to best facilitate our collaboration.

The **technical solution** is our map for developing and integrating all of the complex pieces of your technology puzzle. To be successful, you’ll need deep integration, intuitive workflows, pixel-perfect implementation, and rock solid reporting. We work with you to architect end-to-end solutions that translate the creative to the functional, map the flow of data, and spec out any needed custom development.

While our end-to-end process involves discrete milestones and checkpoints, during the Develop stage, we tend to follow a more “agile” process, in order to give your team many opportunities for input. We ask our clients to play an active role as reviewers and collaborators during this phase, to make sure that we’re achieving the vision mapped together during the Design phase.

**Develop & Integrate**

As development progresses, we turn our attention to a parallel set of processes – getting all of your systems to connect. Our job is to uncover and project all the ways in which you might want to view, use, and manipulate your data, and to create easy integration and robust reporting that you can build on over time.

We believe that training is an ongoing activity that helps organizations take increasing ownership of the toolset and grow the ways they leverage Springboard over time. We start training early in our projects by helping key staff understand the conceptual model of Springboard. As a project progresses, we shift our training activities to a more role-based approach that involves short, webcast training sessions on topics customized by task.

**Train & Enable**

Because we’ve found over the years that a “train the trainer” approach works best, we also do deep-dive training with one or more of your staff, giving them an expert level of knowledge. When a need for additional training arises, whether through staff turnover, change in roles, or a desire to go deeper with the tools, you can either utilize your in-house Springboard expert, or call on your Jackson River team. We also connect clients with a vast repository of free resources to help them extend their knowledge of Drupal, the ins and outs of Salesforce (including our own videos on Forcify.me: <http://www.forcify.me/>), and interesting best practices.

**Verify & Launch**

Once development and integration are complete, we enter an intensive verification period, with a heavy focus on quality assurance (QA) and user acceptance testing (UAT). While we take the lead in testing, the Verify phase is a collaborative process between our team and yours, which may also involve your design partner or other service providers. Behind the scenes, we go through a period of testing every possible data flow to make sure the data is transmitting and landing securely.

When it’s time to launch, our approach is “all hands on deck” – for both our staff and yours. We make sure that all priority issues are resolved and signed off on by your team and then work together to perform the necessary switches to make your project accessible to the world. We follow a master launch checklist that is tailored to the division of labor agreed upon by our teams, to ensure that we’ve addressed every small contingency for a smooth launch.

While launch is an important milestone, we believe that it’s just the beginning of our work together. As your team stabilizes with your new toolset, our Support group is here to help with the transition. We find that our Support work typically begins with lots of how-to questions, and over time evolves into more in-depth support around how to extend the Springboard product, or address a business problem, or help expand your team’s skillset.

**Support & Grow**

We’re excited to see our clients using Springboard and their new tools to transform the way they perform online marketing and fundraising. We know you have ambitious goals and ideas, and we want to be the partner you call on when you’re ready to advance a strategic program or direction. Through our ongoing monthly engagement with clients, we help them build on their toolset, measure their success, and leap forward with increasing speed and sophistication.

## Project Leadership &Communication

At Jackson River, our project managers (PMs) are strategists, nonprofit experts, and most of all trusted consultants who will know every nook and cranny of your project. Our PMs also tend to be CMS-experienced, Salesforce-expert, all-around great resources with lots of industry perspective to offer your team. Your PM will use a variety of tools during the project to facilitate clear communication, team member collaboration, and of course a project that is on time, within budget, and of the highest quality. Our standard project tools include:

**Project Oversight & Tracking: Assembla**

**All of our project activity is centrally managed through Assembla, a collaborative “workspace” tool that we use for both our build projects and ongoing support. During a project, we use an Assembla wiki to keep centralized links to all project documents as well as assigning and communicating about individual tasks across the combined Jackson River and client team.**

**Project Planning: Microsoft Project/OmniPlan/Excel**

Every project has a project plan that includes a detailed task list, dependencies between activities, ownership, and a master schedule. Depending on what works best for your team, we will use one of several project planning tools to create and manage the plan, and then share it with you weekly via Assembla, so that you always have the bird’s eye and ground-level view of our progress.

**Time Tracking: Harvest**

We use Harvest to detail our time on projects and keep them on budget. We track our time daily, which means that your PM always has up-to-date insight on how many hours we’re spending on which activities. We’ll provide a weekly update in each check-in call, but can also produce real-time reports to evaluate budget tracking on a moment’s notice.

While a typical Jackson River project might employ some or all of these communication channels, we’re flexible. Frequently an organization’s design agency might choose to use a collaboration tool like Basecamp, or our clients might want to hold our weekly status calls via video chat. Whatever your preferred method, we’ve probably tried it, and we’re on board.

# Appendix A: About Jackson River

Jackson River is a Washington, DC-based technology consulting firm that works with select influential non-profits, cause-based initiatives, and progressive foundations. Our purpose is to support and strengthen organizations doing good work in the world by using technology to enhance the impact of a cause.

## Our Philosophy

We believe that the right technology can change the world – when it is understood as one element in an organization’s greater ecosystem, operating in service of your long-term success. When you work with Jackson River, your team begins every project from this big-picture organizational view, understanding your structure, capabilities, business processes, marketing objectives and strategic goals, in addition to your technology infrastructure. As a result, Jackson River offers your organization both a toolset and a partnership that:

* reflects a “best of breed” approach in terms of technology and industry expertise;
* is fitted around your needs (rather than you having to adapt to it);
* integrates beautifully with your other technologies and partnerships; and
* your staff members are prepared to leverage with increasing sophistication for many years.

## Our Experience

Jackson River was founded by three veterans of the nonprofit technology, marketing, and strategy world. In 2008, we saw a critical need to help organizations harness the power of open-source and best-of-breed technologies to do good work in the world. As we’ve grown, we’ve built a team of experts that includes direct nonprofit experience; cause marketing expertise; technical experience with applications and websites for nonprofits; and the nonprofit software industry.

Both our software and staff are steeped in the broader context within which organizations are challenged today. Our solutions are informed by:

* The latest in supporter **engagement strategies** and tactics
* The ever-changing landscape of **technology and tools**
* The diverse **operational models** of different types of nonprofits

## Our Team

When you work with Jackson River, you get a team that:

### ****Is Smart and Helpful.****

We strive to be full partners in your success, and are always on the lookout for new ideas and perspectives that your organization might bring to bear. Our clients tend to ask us to the table early in a project, to help think through how best to integrate strategy with technology.

### Plays Well With Others.

Because we support our clients throughout an initiative, we frequently partner with design firms, strategy consultants, PR agencies and other technology shops. We appreciate the new ideas and new ways of thinking that a collaborative approach offers, and take a “check your ego at the door” approach.

### Knows Technology, But Thinks Like Marketers Do.

We’re technology geeks, social and mobile experts, testers and data heads, and advocacy and fundraising people. Most of all, we’re consultants who are rooted in the goals that matter most: building and growing supporter engagement; maximizing conversion and revenue; increasing a sustainer base; reaching supporters in more channels and contexts; and doing all this with increasing effectiveness over time.

### Communicates Well and Often.

We believe that the key to success in every initiative is clear and effective communication. Our style is infused with humor, in service of building strong working relationships; collaborating effectively; keeping everyone focused on the same goals; and getting the job done on time and within budget.

### Balances Quality and Efficiency.

We work smart, and we work hard. Our commitment is to deliver top-notch technical solutions to our clients while also respecting the very real budget and timeline constraints that they face as nonprofit organizations.

### Is Everywhere (Just Like Our Clients Are).

While we’re based out of Washington, DC, our staff members are located across the country. As a distributed organization, we frequently travel to wherever our clients need us. We’re also skilled at remote collaboration, using technology to run complex projects across distances.

### Will Love Your Cause As Much As You Do.

You believe passionately in the work your organization is doing. We do too. Our staff members choose a career with Jackson River in order to work with some of the most extraordinary causes in the progressive sector. We get on board with your mission, and commit to making your technology use a success. We want you to be happy *and* effective.

# Appendix B: Selected Client List

Jackson River has provided technology consulting, web development, training and implementation and integration work for a wide range of progressive organizations.

***100% of our work is from referrals from existing clients or current strategic partners.***

ACLU  
AFL-CIO  
American Constitution Society   
American Jewish World Service

American Society for the Prevention of Cruelty to Animals  
Amnesty USA   
Aspen Institute  
Audubon Society  
Conservation International

Defenders of Wildlife

George Lucas Educational Foundation

International Center for Research on Women

International Fund for Animal Welfare  
International Rescue Committee

Minnesota Public Radio/American Public Media

Office of the Democratic Whip, Steny Hoyer

People for the American Way

Planned Parenthood Federation of America

San Francisco SPCA

Save the Bay

Southern Poverty Law Center  
Student Conservation Association

The Pew Charitable Trusts

Union for Reform Judaism

U.S. Fund for UNICEF  
Wallace Global Fund

# Appendix C: Our Capabilities

  
At Jackson River, we’ve lived and breathed every stage of the nonprofit lifecycle: from technology strategy to organizational development, from mission-driven work to supporter engagement, from online to offline communications, from RFP to finished product. Although our primary charge is the effective selection and implementation of marketing technologies, a big-picture perspective on organizational success is embedded in our DNA.

Our clients engage us to help them with a diverse array of strategic and technical work. We regularly support organizations with:

## Technology Assessment & Strategy

**Services Include:**• Stakeholder interviews

• Organizational resource analysis

• Current toolset assessment

• Technology recommendations

• Actionable rollout plan

• Staffing & process strategy

Because of our commitment to both best-of-breed and open source technologies, organizations often ask us to help recommend a comprehensive set of solutions beyond online marketing and fundraising. We bring all of our industry knowledge to bear in assessing your organization’s model, staffing and skillset, legacy toolset, strategic objectives, and the current challenges to your growth, and then recommend a combination of solutions that can be tailored for your precise needs.

## Springboard Implementation

**Services Include:**

• Technical solution design

• Donation form buildout

• Engagement form buildout

• CRM integration

• Custom dashboard development

• Phased plan for marketing growth

While Springboard is a truly open-source solution, many organizations that choose Springboard as their online marketing and fundraising solution also choose to work with us as their implementation partner. We get each organization up and running with an advanced set of supporter engagement forms, as well as deep CRM integration, tailoring each setup around an organization’s unique priorities for social and mobile marketing, sustainer engagement, analytics and measurement, and other core objectives.

## Website & Campaign Development

**Services Include:**

• Full web presence

• Microsites

• Mobile sites

• Email campaigns

• Social campaigns and apps

• Custom interactions

• Cross-channel campaigns

• Source code and analytics tracking

Many organizations tackle software implementations and major online initiatives such as website redesigns at the same time. A significant amount of our development work involves building websites, microsites, mobile sites, email campaigns, social campaigns and apps, custom interactions, cross-channel campaigns, and the tracking mechanisms that tie all of these critical pieces together into one integrated view. Our developers are adept at translating your designs into effective code that leverages the best of what your CMS and Springboard have to offer.

## Integration & Data Migration

**Services Include:**

• Data migration and consultation

• Offline database integration

• Donor database integration

• Custom application integration

• Integration with 3rd-party CMSes

• Website content migration

• Standard & custom tool integrations

Our work focuses extensively on moving data and content between all of the places you need it to reside. Our technical strategy maps the entire landscape of your data, including all of the ways that you might want to leverage data in the future. Once we have the full picture, we identify the best ways to transmit data between systems, plug the pieces together, help you format and migrate any data or content, test its movement, and then make sure you can access that data to create insight and meaning.

## Analytics & Reporting

**Services Include:**

• Implementing analytics tracking

• Source code strategy

• Custom reporting & dashboards

• Benchmarking

• Data warehousing & reporting

We take the long view of translating supporter activity and behavior into meaningful, actionable information. This includes creating a unified vision across systems, employing tracking and measurement tools like Springboard’s built-in source coding, web analytics tools like Google Analytics and Ecommerce tracking, industry testing and tracking tools like KISS Metrics, and configuring your Springboard, Salesforce, and other databases to serve up all the data you need in a ready-to-use format.

## Optimization & Training

**Services Include:**

• Multivariate testing

• Integrating other testing tools

• Campaign performance analysis

• Benchmarking results

• Recommending growth tactics

• Training internal staff

• Developing Springboard features

Once our clients launch an initiative, they have all of the tools and data they need to succeed. However, turning data into insight, insight into action, and action into growth can be an intensive process, and many organizations look to Jackson River as a long-term partner to optimize their efforts. Sometimes this takes the form of helping their internal staff through process development, training, documentation, or prioritization exercises. At other times, this involves helping clients advance their marketing efforts by suggesting multivariate tests, developing a new technical function or feature to measure a program’s effectiveness, identifying other testing tools or protocols, evaluating the performance of a specific initiative, or recommending ways to optimize content and data to better engage and convert supporters.