Request for Quotation

For Giving Platform Software as a Service
WFUND-001

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Development

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Introduction

Winrock International invites qualified vendors to submit quotations for a secure, scalable online giving platform delivered as a Software as a Service (SaaS) solution. The platform will support fundraising and contributor engagement through user-friendly contributor experience, payment processing, contributor data and duplicate management, acknowledgements and receipts, refunds, fundraising performance and attribution reporting, and integrations with DAFPay and Salesforce, including Salesforce Nonprofit Cloud capabilities. Winrock anticipates an initial one-year subscription with up to four one-year renewal options, for a maximum potential term of five years. No estimated budget is provided. Vendors must distinguish standard capabilities from configurable functions, custom development, third-party dependencies, optional products, roadmap items, and separately priced services.

Submission Details

Submission Deadlines

Proposals must be received no later than 5:00 PM Central Time on December 17, 2026. Late submissions will not be accepted. All proposals must follow the guidelines below. Telephone requests will not be honored.

Winrock International may request additional documentation after the bid deadline.

Submission Delivery Address

Electronic submission is required. Submit proposals only to procurement@winrock.org

Use the subject line: WFUND-001 – Giving Platform SaaS – [Vendor Legal Name]. Vendors must not submit proposals to or seek solicitation guidance from other Winrock personnel. Vendors are responsible for confirming that files are readable and free from access restrictions.

Submission Questions and Clarifications

Questions must be received no later than 5:00 PM Central Time on December 9, 2026, and must be submitted only by email to procurement@winrock.org. Responses or instructions from any other source are not binding on Winrock.

Winrock will evaluate complete vendor proposals to determine which proposal represents the best value to Winrock. This is an unsealed solicitation request. Winrock reserves the right to negotiate with the vendors with or without discussion.

Pre-Bid Conference

No pre-bid conference is currently scheduled. Winrock may invite shortlisted vendors to demonstrations or clarification sessions during the evaluation process.

Instructions to Vendors

Quotations must remain valid for 90 calendar days. Provide pricing in U.S. dollars for the initial year and each of four potential renewal years. Separately identify subscription, implementation, Salesforce integration, training, support, transaction-processing, third-party, optional, and renewal costs. State assumptions, exclusions, dependencies, usage limits, payment terms, service level/SLA terms, data-export terms, annual escalation, and termination-assistance terms. Do not include banking information unless requested by Winrock after selection. Disclose material subcontractors, payment processors, integration partners, and subprocessors. Fill in the attached ICT forms as needed.

Bid Documents to Include

Include the vendor's legal business name, principal address, website, ownership structure, authorized representative, business registration, executive summary, requirements response, implementation and integration plan, training and support plan, security and privacy documentation, complete five-year pricing, at least three comparable nonprofit references, and all exceptions to the RFQ or proposed contractual terms.

Document Standards

- Proposal narrative must be submitted in searchable PDF format.
- Pricing may be submitted in PDF or Excel and must correspond to the pricing categories in this RFQ.
- Use the RFQ section headings, answer each requirement directly, and clearly mark proprietary information. Marketing materials may supplement but not replace direct responses.

Award

Winrock anticipates selecting a vendor on or about January 15, 2027, and targeting implementation/go-live by March 1, 2027. Selection does not constitute a binding contract. No obligation exists until an agreement is fully executed by authorized representatives of Winrock and the selected vendor.

- Winrock will run an open and fair competitive bidding process.
- As warranted, Winrock may increase or decrease the quantities.

Detailed Specifications

The proposed solution must be a secure, scalable, hosted SaaS giving platform. For every requirement, identify whether the capability is standard, configurable, optional, provided by a third party, planned, or requires custom development. Disclose limitations, dependencies, costs, and implementation responsibilities.

Core Platform Requirements

- Mobile-responsive, accessible, Winrock-branded contribution pages, with the ability for authorized Winrock staff to create, duplicate, customize, preview, and manage pages without vendor assistance. Describe available page and form configuration options and other functionalities designed to reduce contributor friction or improve conversion.
- One-time and recurring contributions, campaigns, designations, suggested amounts, custom fields, and contributor-covered fee options.
- Recurring gift management, including contributor and staff ability to update payment information, gift amount, frequency, or designation; failed-payment recovery and automated retries; contributor notifications; cancellation; and reporting on recurring-gift status and retention.
- Contributor records, contribution history, duplicate identification and management, and export of contributor and transaction data.
- Automated confirmations, acknowledgements, and receipts, including correction or reissuance where supported.
- Refund, cancellation, failed payment, and chargeback workflows.
- Reporting for campaigns, contributions, settlements, recurring gifts, refunds, chargebacks, and contributors.
- Fundraising attribution and performance analytics, including the ability to track campaign and contribution source, campaign/source codes, UTM parameters, and referring sources where available. Describe available reporting on contribution-page performance, conversion, average gift, one-time versus recurring giving, recurring-gift retention, payment failures, and other fundraising performance measures, as well as integrations with tools such as Google Analytics 4 and Google Tag Manager.
- Role-based access, audit history, administrative controls, training, documentation, and support.

Salesforce and DAFPay Integration

Describe current integration capacity with Salesforce, including Salesforce Nonprofit Cloud. Address native connectors, APIs, middleware, one-way and bidirectional options, real-time and scheduled synchronization, contributor matching, duplicate handling, standard and custom object mapping, campaigns, recurring gifts, refunds, failed payments, error monitoring, reconciliation, sandbox testing, responsibilities, limitations, timeline, and initial and ongoing costs.

Describe the ability to capture contributor communication preferences and configurable opt-in or consent language through contribution forms and to synchronize relevant preference or consent data with Salesforce.

Describe current integration capacity with DAFPay, including how donor-advised fund contributions are initiated and processed through the proposed platform and how contributor, contribution, fund, and transaction information is captured and transferred. Address native integration or other technical requirements, available data fields, contributor matching,

transaction status and reconciliation, error handling, reporting, implementation responsibilities, limitations, timeline, and any initial or ongoing costs.

Data Migration

Winrock will not identify the replaced platform in this solicitation. Migration is not expected to be needed.

Implementation, Reporting, Support, and Security

Provide an implementation plan supporting the February 1, 2027, target, including testing, cutover, training, support, service levels, settlement and reconciliation reporting, SOC 2 Type II or equivalent assurance, PCI DSS compliance, encryption, multifactor authentication, role-based access, Microsoft Entra ID/SAML options, audit logging, hosting, subprocessors, incident response, backup, disaster recovery, data export, transition assistance, and secure deletion.

Payment or Giving Method	Support and Limitations	Included, Optional, or Third Party	Fees
Credit and debit cards	Vendor response	Vendor response	Vendor response
ACH/direct bank transfer and electronic checks	Vendor response	Vendor response	Vendor response
Wire transfers	Vendor response	Vendor response	Vendor response
PayPal, Venmo, Apple Pay, Google Pay, and other digital wallets	Vendor response	Vendor response	Vendor response
DAFPay and other donor-advised fund methods	Vendor response	Vendor response	Vendor response
Recurring gifts, pledges, and matching gifts	Vendor response	Vendor response	Vendor response
Stock/securities and cryptocurrency	Vendor response	Vendor response	Vendor response
International cards and multiple currencies	Vendor response	Vendor response	Vendor response

Text-to-give, QR code, peer-to-peer, and event giving	Vendor response	Vendor response	Vendor response
Tribute, memorial, and anonymous contributions	Vendor response	Vendor response	Vendor response
Contributor-covered processing fees and other channels	Vendor response	Vendor response	Vendor response

Pricing	Year 1	Year 2	Year 3	Year 4	Year 5
SaaS subscription					
Implementation/Other					
Salesforce integration					
Training and support					
Estimated processing/transaction fees					
Total evaluated cost					

Assumptions & Constraints

- The solution is a hosted SaaS subscription for an initial one-year term with up to four one-year renewal options. Renewal is not guaranteed.
- No estimated budget is to be provided by Winrock.
- The final integration, configuration, security, and service-level scope will be confirmed during evaluation and contracting.
- Winrock owns its contributor, transaction, campaign, and organizational data.
- The vendor may be required to execute Winrock terms, a data protection agreement, security requirements, and a service-level agreement.

- Winrock's name, logo, relationship, and contributor data may not be used for publicity without prior written authorization.
- Identify custom development, upgrade, licensing, storage, API, modification, data-export, transition, and termination costs.

Evaluation Criteria

Award will be based on the best value overall. Technical and functional fit will be the primary consideration; price alone will not determine selection. Winrock may evaluate written responses, demonstrations, clarifications, references, security review, and contractual review.

Awards will be based on a variety of factors including, but not limited to technical acceptability (features, warranty, and support services), price, delivery time, and references. Scoring criteria are shown below:

Evaluation Area	Indicative Weight
Fundraising functionality, contributor experience, and ease of use	25%
Salesforce and other integrations	20%
Security, privacy, and compliance	15%
Implementation, and go-live readiness	15%
Reporting, reconciliation, and financial administration	10%
Vendor experience, support, and service levels	5%
Total evaluated cost	10%
Total	100%

Certification of Independent Price Determination

(a) The offeror certifies that—

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror, including but not limited to subsidiaries or other entities in which offeror has any ownership or

other interests, or any competitor relating to (i) those prices, (ii) the intention to submit an offer, or (iii) the methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror, including but not limited to subsidiaries or other entities in which offeror has any ownership or other interests, or any competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated or competitive solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern or individual to submit or not to submit an offer for the purpose of restricting competition or influencing the competitive environment.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory—

(1) Is the person in the offerors organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; or

(2) (i) Has been authorized, in writing, to act as agent for the principals of the offeror in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(1) through (a)(3) above; (ii) As an authorized agent, does certify that the principals of the offeror have not participated, and will not participate, in any action contrary to subparagraphs

(a)(1) through (a)(3) above; and (iii) As an agent, has not personally participated, and will not participate, in any action contrary to subparagraphs (a)(1) through.

(a)(3) above.

(c) Offeror understands and agrees that –

(1) violation of this certification will result in immediate disqualification from this solicitation without recourse and may result in disqualification from future solicitations; and

(2) Discovery of any violation after award to the offeror will result in the termination of the award for default.