Saint Louis Zoo
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Addendum #4
Customer Relationship Management (CRM) and Ticketing Solution RFP 2025
Project Number: 2025-04-014

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ATTACHMENTS

1. Saint Louis Zoo Current State Ecosystem Model.pdf
2. Campaign Policies_Final_November 2023

QUESTIONS	ANSWERS
32. The following are our questions regarding items found on the requirements list:	Header question.
32d Please provide more context to help us understand what is needed here: *Please discuss how disposition will be applied to the records/information.*	The Zoo's data retention and record disposition policies tend to follow recommended best practices and regulations based on data type, e.g., at least one year for audit history, at least three years for financial information, at least six years for covered entities under specific requirements such as HIPAA, etc. Please describe/share your default data retention policy and options to customize or modify this policy

38. What is the total number of staff members that would need an individual login to your new solution (across all departments)?	230
41. How many scanning devices to scan tickets, member cards, etc. at entry points will you need?	See Attachment 1 in Addendum 3. Currently 19 scanners in use.
78. Is offshore work permitted for any aspect of this project — including implementation, support, or development activities? Please confirm if it is acceptable even when all client data is stored and processed within the United States.	No
86. Can you provide the split of this 85 marks in evaluation grid among the sections that you have asked in the response requirements?	The Zoo cannot supply the exact split of the points, yet it is based on all the categories in the requirements checklist.
123. Are you willing to use global delivery resources for the implementation?	No
125. How many constituent records exist today across systems?	The Raisers Edge currently has over 500,000 records. Many are marked as inactive, and may not need to be migrated. Education data records has 5000K+
126. How much historical data (donations, visits, memberships, etc.) needs to be migrated and in what detail?	5 years of active historical data and the level of detail is to be determined. High level donor data would need all history on record regardless of length.
128. How are recurring payments (e.g., for memberships or pledges) expected to be managed—via native tools or third-party gateways?	The ideal situation would be for recurring payments to be managed natively.
136. What is the definitive scope of phase one vs. later phases? Are both attractions (Destination Discovery and WildCare Park) included in the initial implementation, or is WildCare Park in a later phase?	Destination Discovery will open in 2026, and WildCare Park will open in 2027. From a systems perspective, the Zoo will need all the functionality defined in the RFP for the 2026 opening of Destination Discovery, with the following exceptions: - Verification of St. Louis County residents at WildCare Park for

	free general admission ticketing
	- Integration with Finance will depend on the implementation of the new ERP. At minimum, CRM and Ticketing must be able to send flat files of transactional data to Finance at go-live. - Integration with Food and Beverage will depend on the implementation of the new Food and Beverage system. At a minimum, CRM and Ticketing must be able to share current membership status data with Food and Beverage to redeem members' discount benefits. - Integration with Retail - At a minimum, CRM and Ticketing must be able to share current membership status data with TAM for redemption of members' discount benefits for retail. Further discussions to refine the implementation scope will occur later in the system selection process.
150. Are there non-negotiable business rules or workflows that must be replicated exactly as-is from the current systems?	The Zoo is open to implementing new processes and workflows based on best practices.
154. Is there a preferred method for ongoing support and knowledge transfer post-implementation (e.g. embedded vendor support)?	Immediately post-implementation, the Zoo expects a stabilization period, in which staff will need higher levels of support and continued training/knowledge transfer as they settle into the new system(s). A variety of methods will be useful – phone, chat, live web sessions, recorded videos, online knowledgebase, etc. Embedded support would be welcome. Please describe your training and support offerings in your proposal.

164. What KPIs or ROI measures are expected to be met within the first year of implementation?	The Zoo has not yet determined these measures.
165. What are the top measurable business outcomes expected from this CRM & ticketing initiative?	Revenue, Growth, Experience quality, Retention, Cost savings through saved time and workflow efficiency
166. Is there an existing vendor for either CRM or ticketing? Are they being considered again?	See Question #19.
167. What are the critical constraints (timeline, budget ceiling, internal dependencies)?	See Question #1.
168. Can we know the budget allocated for this project engagement? And what is expected timeline?	See Questions #1 and #2.
169. What Microsoft licenses such as Microsoft 365, Office 365 or SharePoint currently you have? This may includes Microsoft G3/ E3 subscription as well?	The Zoo currently has A1, A3, and A5 licenses. Most of the Zoo's licenses are A1s.
170. How do you define a "360-degree view", what entities and touchpoints should be unified (CRM, ticketing, donor, retail, events, etc.)?	A 360-degree view is defined as visibility on all touchpoints, including educational programming.
171. What systems or departments have siloed data that must be fetched into the CRM?	The majority of the Zoo's departments must be fetched into the CRM.
175. The financial transactions, will all stored in the ERP system, what financial information you are expecting at CRM level	Transactions in the CRM should include all payment and general ledger coding information.
196. What is the preferred accounting treatment for soft credits and gift recognition? Is there an existing gift policy document?	The Zoo has a gift acceptance recognition policy. See Attachment 2.
198. Do you require payment gateway integration for donor portals (Stripe, Authorize.net, etc.)?"	The Zoo does not have a donor portal in place and will rely on best practices and recommendations.
199. Do you currently have it or you require a donor self-service portal as part of this project engagement?	The Zoo does not currently have a donor portal but would like one in the future system. See items 285, 335, 275 and 248 on the Requirements List.
200. What volume of events are typically managed annually by the Development team vs Education vs Zoo public events?	Approximately 20 public, ticketed events per year; plus 20-25 public, ticketed behind-the-scenes tours per year.

	In Education, approximately 85 Marlin Perkins, 1695 Zoo Member/Employees, and 338 General Public orders, besides the 146 registration orders without Zoo Member/General Public pricing annually (but this may change as our program grows each year.) Separately, we have approximately 900 event bookings annually.
230. We would like to ask the current number of records of the following:	Header question.
a. Members	Approximately 55,000 active.
b. Membership categories	About 25 (10 new and 15 historical, not counting the animal adoption program)
c. Annual Visitors/ Guests (for Lead data)	The Zoo has 2.8 million average visitors per year. 55K are members . Anyone outside of these categories, the Zoo considers a potential lead.
d. Donors	The Zoo considers members to be donors. In addition to membership, we also have Zoo parent adoptions, and straight donations. Over 50,000.
e. Event Tickets issued monthly, quarterly and annually	Approximately 271k issued annually
f. Surveys sent monthly, quarterly, bi-annually or yearly	Surveys are automated, not "campaigns" based. I would estimate we send about 10k (non-unique) guests/member annually (via email).
g. Gift Types	At least 18.
h. No of Document archived and size	The Zoo currently does not have this at this time yet is interested in moving forward. Education does have documents archived yet the Zoo is unable to provide a number at this time.
i. No of Email Interactions per month, quarter, bi-annual, yearly	Via Active Campaign we send approx. 220 email campaigns annually to a concatenated total of 7M email addresses. Additionally, transactional (confirmation, reminder, tickets

	attached, etc.) emails are sent via TAM.
231. We are assuming the following users to be part of the proposed CRM, E-Commerce (e-Ticketing system)	Yes, this can be assumed with, also, adding Finance to the list.
a. Managers (Reporting)	-
b. Administrators	-
c. Constituent Management	-
d. E-Commerce/ POS	-
e. Events	-
f. Education	-
g. IT	-
h. Gift Processing	-
i. Onboarding (Membership)	-
j. Marketing	-
k. Sales/ Prospect	-
l. Financial Aid	The Zoo is unclear what this is referencing.
234. We have an integrated ERP option, how much detail would you like to see around a total solution for "fundraising to finance"?	The ERP option should be addressed with the current ERP RFP.
245. What reports or metrics do you wish you had today but don't?	• Specifically for CRM/Ticketing, the big ones are comprehensive **customer lifetime value** and **customer acquisition cost** reporting, with cohort analysis and flexible segmentation options • And **data quality** reporting: accuracy, completeness, consistency, reliability, timeliness, with rates of errors, missing data, duplicates, and inconsistencies
272. Are there any known change adoption concerns or process challenges we should be aware of?	The current process to share membership data between the CRM and Ticketing systems has many manual steps, and staff want the process to be more automated in the future system(s).

	The Zoo acknowledges adoption concerns which will be addressed by the internal team.
274. (item 620) Can you tell us more about your record dispositions needs?	The Zoo's data retention and record disposition policies tend to follow recommended best practices and regulations based on data type, e.g., at least one year for audit history, at least three years for financial information, at least six years for covered entities under specific requirements such as HIPAA, etc. Please describe/share your default data retention policy and options to customize or modify this policy
280. Now many ecommerce orders for ticketed events are processed per year?	Estimated 75k-85k orders
281. How many ecommerce tickets were sold last year (qty)?	Estimated 285K
282. To better assess the size of the expected data migration, can you please provide record counts from the fundraising system for things like:	Header question.
a.　　Constituents	500K+
b.　　Organizations	100K+
c.　　Gifts	2M+
d.　　Notes	100K+
e.　　Actions	265K+
f.　　Funds	250+
g.　　Appeals	300+
h.　　Events	Not captured
i.　　Participants	Not captured
j.　　Transactions	Not captures
k.　　Activities	Not captured
l.　　Etc…	-
285. Should organizational change management services be included in the scope of this engagement, i.e. change management strategy, communication planning, stakeholder analysis, etc.?	No. The Zoo does not require this at this time.

290. Which systems are prioritized and must be integrated in Phase 1?	CRM and Ticketing, Website, Email Marketing must be integrated in Phase 1. See also Question #136.
291. What business processes are documented?	The Zoo's guest experience, education, and membership processes are documented.
293. Do you have a moves management strategy? If so, please share.	Yes, though our CRM makes it hard to track. We'd like to be able to see how long a person stays in each phase.
294. Describe your fundraising portfolio diversity and size.	We currently have over 1,800 individuals, foundations, and corporations in active prospect management. Many are members, some are members of our planned giving society, some are only donors; each category has a lot of overlap.
298. Can Saint Louis Zoo share any system architecture diagrams?	See Attachment #1.
301. In general, how well are the current-state functional processes documented?	See Question #291.
302. How does Saint Louis Zoo keep track of project plans, documentation, decisions, and other project admin tools or processes?	The Zoo uses a variety of tools, including tools native to the chosen vendor.
303. How does Saint Louis Zoo make decisions?	The core group meets and makes decisions based on priorities, risks, and expected outcomes.
304. How does the leadership make decisions about risks and recommended mitigation paths?	We reference our risk matrix developed specifically for this project and make decisions as a group based on the matrix.
305. Who will be involved in this engagement from Saint Louis Zoo? What are their responsibilities?	A core team of decision makers across all listed departments. Key responsibilities include assessing risks, making decisions, and ensuring the project stays on task.
306. Who will manage this solution once the engagement is complete?	Zoo team will work with selected vendor to manage.
307. Who/what resources will be involved in this engagement from the Saint Louis Zoo?	See Q305 for a and b.
a. What are their responsibilities?	To be determined during implementation.

b. What skill sets does the Saint Louis Zoo have available to support this project?	See above.
c. Is there a desire for shared ownership of project tasks? If so, which ones?	The Zoo needs more information to answer this question.
336. How important is it to have a unified profile of each constituent encapsulating all data sources?	The Zoo believes it is very important to have a unified profile in order to have a 360- degree view.
337. How many staff members are at STL (including FTE, PTE, seasonal)?	FT: 447 PTB: 112 PT: 84 Seasonal: 887 Paid Interns: 21
a. Of those, how many are seasonal and what is the time of year where they most engage with the zoo?	887- May – August is typically when we see the highest number of employees.
b. How many are PTE	84
364. How much do you currently raise online annually?	The Zoo would need further clarity in order to answer this question.
365. Are you able to break this down between campaigns? (ie online donation form, events, and peer-to-peer)	Yes.
366. How much do you currently raise online annually through recurring gifts? (separate from memberships)	The Zoo currently does not utilize this feature at this time.
367. What kind of expectations do you have around implementation services for giving forms/p2p?	The Zoo expects integration with the CRM for a streamlined process.
368. Is your team looking at the total cost of fundraising holistically or are there components of a fee structure that are more important than others (i.e. we would rather pay a higher subscription to lock in lower transaction fees or vice versa)?	The Zoo is willing to discuss this further through the implementation process.
379. Training Needs: Can you provide more details about the preferred format and frequency of training sessions for staff?	Onsite training is preferred with some departments. Online training is acceptable. Frequency will be determined during implementation and reevaluated as the project progresses.

383. Can you share more about your evaluation process and weighting of criteria (e.g., cost, functionality, vendor experience)?	See Question #86.
384. Are there any anticipated changes to your operational structure or business model that could impact the scope of this project?	Not at this time.
386. Are there particular pain points or inefficiencies in your current systems that you would like the new solution to address first?	Yes, as defined in the RFP.
387. How do you define success for this project—what are the key outcomes or metrics you will use to measure the effectiveness of the new CRM and ticketing solution?	See Question #164.
389. Are there any preferred integration methods (APIs, file-based, etc.) or existing middleware platforms in use?	The Zoo's preferred integration methods are modern REST APIs and related tools for iPaaS interoperability
395. The requirements (Guest Experience - Group Ticketing) detail a need to "Allow corporate partners to manage their own ticket inventory." Can you provide more information, and/or a relevant use case?	The Zoo customizes tickets specifically for our corporate sponsors and likes them to manage their allotment of tickets as they deem appropriate.
396. The requirements (Membership – Configuration) detail a need for the "Member portal should be customizable by the SuperUser/Administrator and show membership level, expiration date, and payment status including number of payments remaining for monthly payments on an annual membership." Can you provide more information on the monthly payment schedules or use case? How are monthly membership payments managed today?	At this time, monthly payment schedules are only available for MPS members and donations over $2k. The Zoo would like to explore the ability to have monthly payments for all membership levels.
404. What are your most critical reporting needs? Are there specific dashboards or KPIs you want to see in real time?	See Question # 245. Additionally: • Daily Totals and Summaries • SKU movement and SKU movement forecast reports • Sales Activity by timeframes (hourly, etc.) • Vendor Performance

	- Ecommerce reporting with similar design/sources to GA4 reports/views - Unified ticketing reporting, with converged session revenue, redemption, and relevant segmentation/categorization - Net revenue reporting - Sales and revenue forecast reports

END OF ADDENDUM