

Request for Proposal (RFP)
Direct Response Fundraising Program

Date: July 13, 2020

Subject: Request for Proposal

TechnoServe, Inc. (TNS) – Arlington, VA invites your firm to participate in this competitive solicitation to provide strategic consultation, creative development, and print and production services for its direct response fundraising program.

The chosen firm will be offered a three-year term plus one-year possible extension.

ABOUT TECHNOERVE

Founded in 1968, TechnoServe is a leader in harnessing the power of the private sector to help people lift themselves out of poverty. A nonprofit organization operating in 29 countries, we work with enterprising men and women in the developing world to build competitive farms, businesses, and industries. By linking people to information, capital, and markets, we have helped millions to create lasting prosperity for their families and communities. More information can be found at www.technoserve.org.

DIRECT MARKETING PROGRAM BACKGROUND

With five full-time fundraising professionals, TechnoServe's private fundraising team currently raises approximately \$5 million which represents about 5% of the organization's annual budget. In 2019, TechnoServe's direct marketing program contributed approximately \$1.13 million towards the \$5 million goal.

Our donors:

- 14,887 active one-time donors (last donation made 6/1/18-6/1/20)
- 247 monthly donors (as of May 2020)
- 10,500 Lapsed donors (last gift date 6/1/17-5/31/19)
- 25,000 email addresses (donors and subscribers) [number from HS contacts list]

TechnoServe's current annual direct response program includes:

Acquisition

- Donor acquisition mailings 4 to 5 times per year
- Online advertising, including social media and Google ads
- Welcome packet for new direct mail donors

HEADQUARTERS

1777 N Kent Street | Suite 1100 | Arlington, VA 22209
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Existing Donors

- Approximately 13 appeals per year, including 2 high dollar appeals
 - Integrated email appeals for 3 to 4 appeals
- Four newsletters
- One planned giving brochure
- Ongoing e-appeals and monthly cultivation emails

TechnoServe currently works with the following vendors:

- Merkle – gift processing and caging
- VeraData – list management
- HubSpot – online donation processing and email list management
- Blackbaud
 - The Raiser’s Edge – donor database
 - RE NXT
 - ResearchPoint and Target Analytics

SCOPE OF WORK

Our long-term goal is to increase private fundraising 5% to 10% of the annual budget each year. Our goal for our direct mail program is to continue to be a significant overall driver of revenue as well as an important pipeline of new donors for other fundraising programs. We are looking to the firm to provide strategic services, including overall program analysis and day-to-day guidance on TechnoServe’s direct response fundraising program.

1. Strategic advice, consulting, and technical support
 - a. Provide overall strategic advice to continue building a database of individual donors to increase overall revenue
 - b. Develop an annual direct marketing plan that maximizes income, grows the donor base, and increases LTV of donors
 - c. Acquisition strategy
 - i. Provides a cost-effective means of acquiring high quality new donors to TechnoServe
 - d. Include strategy to integrate direct mail campaigns with online digital work
 - e. Provide strategy for using direct mail to grow the monthly donor (*Partners in Prosperity*), midlevel and planned giving programs
2. If required, the firm would be responsible for assisting with finding vendors for other services, including list brokers.
3. Creative development, including creative concepts, research, copywriting and creative design. Provide creating and concept development, research and copy design for the direct marketing program. This will include an annual creative plan, a creative brief for each campaign which will include key messages, testing recommendations, and rationale.
4. Production management, including print services, postage costs, laser/letter shopping.

5. Provide production management and implementation of the printing and mailing of direct marketing materials.
6. Develop and manage schedules for each campaign and ensure the maintenance of quality control standards
7. Progress reporting and strategic analysis including regular weekly updates on progress of direct mail and integrated digital campaigns
 - a. Period review and assessment of program performance against established key indicators: gross revenue, cost/\$ raised, cost per new donor, response rate, average gift
8. Comply with TechnoServe's privacy policy and stay updated on best practices for data security

CHALLENGES

TechnoServe is an organization with a long history of success and is recognized as a leader in its field, but has poor name recognition in the US. Further, we have an aging file with a large number of donors over 65.

Our small file size can make exchanges and negotiations difficult.

PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this solicitation is anticipated to begin on or about September 1, 2020.

CRITERIA FOR SELECTION

The evaluation of each response to this RFP will be based on requirements set out in the solicitation and any addenda thereto. **TechnoServe will invite a select number of vendors to make formal oral presentations to the evaluation committee. Presentations may be via video conferencing as determined by social distancing requirements.**

TechnoServe will review bids for all or some of the element of the Scope of Work above and reserves the right to match two or more vendor's scope of services to meet our entire need if an integrated solution is not proposed by the vendor. **If the vendor intends to use other subcontracting agencies to fulfill some aspects of the fundraising campaign, this must be known by TechnoServe and included in your proposal.**

Proposals should detail the vendor's proposed process for working with TechnoServe, which includes but is not limited to, formulating program and fundraising strategies, budget, designing and creating direct mail packages, yearly schedules, reporting results, and coordination with other aspects of TechnoServe's fundraising operations.

The following weighting and points will be assigned to the proposal for evaluations purposes:

Technical Proposal - 50%
Project Approach - 20 points (maximum)
Quality of work plan - 20 points (maximum)

Includes all the required information required in the RFP - 10 points (maximum)
Management Proposal - 35% Project team structure - 15 points (maximum) Staff experience with similar assignments - 10 points (maximum) Experience of the Firm - 10 points (maximum)
Cost proposal - 15%
TOTAL - 100 POINTS

TechnoServe reserves the right to award the contract to the organization whose proposal is deemed to be in the best interest of TechnoServe.

The organization with the winning proposal will be notified in writing. Those who were not selected may or may not be notified, at the sole discretion of TechnoServe.

TERMS AND CONDITIONS

1. The Request for Proposal is not and shall not be considered an offer by TechnoServe.
2. All responses must be received on or before the date and time indicated below. All late responses will be rejected.
3. All unresponsive responses will be rejected.
4. All proposals will be considered binding offers. Prices proposed must be valid for the entire period provided by respondent or required by RFP.
5. All awards will be subject to TNS contractual terms and conditions and contingent on the availability of donor funding.
6. TNS reserves the right to accept or reject any proposal or cancel the solicitation process at any time, and shall have no liability to the proposing organizations submitting proposals for such rejection or cancellation of the request for proposals.
7. TNS reserves the right to accept all or part of the proposal when award is provided.
8. All information provided by TNS in this RFP is offered in good faith. Individual items are subject to change at any time, and all bidders will be provided with notification of any changes. TNS is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
9. TNS reserves the right to require any bidder to enter into a non-disclosure agreement.
10. The bidders are solely obligated to pay for any costs, of any kind whatsoever, which may be incurred by bidder or any third parties, in connection with the Response. All responses and supporting documentation shall become the property of TNS, subject to claims of confidentiality in respect of the response and supporting documentation, which have been clearly marked confidential by the bidder.
11. Bidders are required to identify and disclose any actual or potential Conflict of Interest.

FORM/CONTENT OF RESPONSE

All proposals shall:

1. Be in the English language.
2. Contain detailed cost in US Dollar, with applicable Tax/Charges clearly identified.
3. Provide requested payment terms and conditions.
4. Describe the qualifications, experience and capabilities of the firm in providing the type of services being requested by this RFP. Resumes or CVs of “key personnel” shall be submitted as an attachment.
5. Include a contact name, email address, and telephone number to facilitate communication between TNS and the submitting organization.
6. A brief outline of the organization and services offered, including:
 - Full legal name, jurisdiction of incorporation and address of the company
 - Full legal name and country of citizenry of company’s President and / or Chief Executive Officer, and all other officers and senior managers of the company
 - Year business was established
7. Your proposal must affirm ALL the following statements. In doing so, please fill in the required information. You must explicitly reveal and explain any exceptions to or deviations from these statements.
 - a. The _____ Agency is properly registered and/or bonded in all states requiring charitable solicitation registration and has no current state regulatory enforcement actions pending against it related to charitable registration or fundraising that would interfere with TechnoServe’s ability to fundraise in any and all jurisdictions.
 - b. None of the _____ Agency or its officers, directors, or owners, nor any current client of _____ Agency has any state, federal, internal revenue, postal, federal trade commission or criminal enforcement actions pending against it, nor have any of these organizations or individuals had such an action pending or current in the past 36 months to the best of the knowledge of any officer, director, or owner of the _____ Agency.
 - c. The _____ Agency or our principals and owners have the following affiliates which are partially or wholly owned by our agency or our principals and owners or with which we deal other than completely “at arm’s length” (List _____).
 - d. Of the preceding list of affiliates, the following are proposed as subcontractors under the _____ Agency proposal to (List _____).
 - e. The _____ Agency agrees that before entering into any contract with TechnoServe it will be required to agree not to enter into any agreements or understandings of any type of description with any vendors or subcontractors to TechnoServe which would provide commissions, finder’s fees, discounts, or any form of compensation or benefit to the _____ Agency or to any third party (including officers, directors, or staff of TechnoServe) other than directly to TechnoServe except as specifically approved in writing by TechnoServe.

SCHEDULE OF EVENTS

1. Questions regarding this request may be addressed to Katie Corradini at kcorradini@tns.org and must be received no later than **July 20, 2020**. Responses to questions will be distributed to all interested parties no later than **July 24, 2020**.
2. Responses to the RFP should be addressed to the attention of Katie Corradini, Manager, Annual Fund, at kcorradini@tns.org **no later than August 12, 2020**.

End of RFP