

**Request for Proposal: Digital Marketing Agency**  
**Date: August 17, 2020**



**Subject: Request for Proposal**

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

**ABOUT TECHNOERVE**

Founded in 1968, TechnoServe is a leading nonprofit that helps people lift themselves out of poverty. Operating in 26 countries, we believe that everyone deserves the opportunity to build a better life. TechnoServe provides business solutions to poverty: a combination of deep knowledge of the people we work with, world-class market analysis, rigorous measurement and on the ground engagement with people. Our work enables small scale farmers and entrepreneurs to build a better future for themselves, their families and their communities. More information can be found at [www.technoserve.org](http://www.technoserve.org).

**BACKGROUND ON TECHNOERVE'S DIGITAL ENGAGEMENT PROGRAM**

The Digital Engagement team at TechnoServe is on a journey to build and optimize our digital presence, user experience, and revenue. Our main objective is to grow unrestricted giving, while also acquiring new email names and building brand awareness and engagement through our digital channels. During the past 2 ½ years we have redesigned our website, adopted HubSpot as our marketing platform, started paid advertising, and begun testing and optimization efforts in addition to transitioning to a new Martech Stack (see details below). We are looking for a partner that can help us apply the benchmark data and insights we are capturing in 2020 to:

- continue to evolve our strategy,
- create and execute effective and inspiring digital marketing solutions that generate significant increases in revenue
- grow awareness and engagement of our brand and distinctive approach to fighting poverty among key audiences.

**TechnoServe Martech Stack**

- CMS: WordPress
- Host: Pantheon

- CRM Marketing Automation/ESP: Hubspot
- Optimization and Analysis: Google Analytics, Google Optimize, Crazy Egg, Moz
- User Research: UserTesting
- DAM: Third Light
- Editorial Calendar / Project Planning: CoSchedule
- Video: YouTube
- Donor Database: Blackbaud Raiser's Edge

## **Target Audience**

Our provisional persona for online giving is *The Global Citizen*. We plan to conduct additional research to solidify this profile and our basic hypothesis (based on what we know about our donors in other channels) includes the following characteristics:

- High education (Masters degree +)
- High household income (\$200k +)
- East/west coast location
- Professional/managerial occupations
- International travel in past year
- World View: aware of and understands the wider world and his/her place in it
- Cross Cultural: Has an expanded view of community
- Understanding Lifestyle: Nurtures a lifestyle that supports sustainable global development
- Interests: Supports world art, music, food and culture
- Personality: Open, agreeable, empathetic, and caring

## **Values:**

- Diversity, social justice and environmental sustainability
- Demonstrates less prejudice toward many groups; tends to be more liberal on both domestic and international issues
- Cares more about human rights, worldwide inequality, global poverty and human suffering
- Attend more actively to global concerns, values the lives of all human beings more equally

## **Behaviors:**

- Demonstrates intergroup empathy and caring; feel a responsibility to act
- Gives more in time and money to international humanitarian causes

## **2020 Performance**

In 2020, we are on track to raise approximately \$340,000 through digital, about 80% through one time donations, a growth rate of ~40% YoY. Actual dollars raised through July are over 200% ahead of this time last year. In addition, we are ahead of forecast to add 3600 new email

names, about 15% of our 2019 list. Our media budget for 2020 is \$125,000. We have not set our 2021 media budget yet.

If you are intrigued by the opportunity to partner with a data driven organization in aggressive growth-mode to raise more money to fight poverty around the world, then we invite your firm to participate in this competitive solicitation for pricing, delivery, and terms of service to provide digital marketing services as detailed below.

## **SCOPE OF WORK**

Strategic planning, implementation, data analysis, and optimization of the following:

- a. Content Marketing: provide relevant and useful content targeted to our prospects and donors to deepen engagement and to grow relevant communities that inspire donations and influencers.
- b. SEO: provide strategies and implementation recommendations to increase organic search visibility for relevant topics and keywords to support our revenue goals.
- c. Email Marketing & Automation: provide email marketing strategy and support inclusive of copywriting and email design.
- d. Digital Advertising: provide digital advertising strategy and creative to deliver on identified key performance indicators and return on ad spend by utilizing a mix inclusive of Google Grants, paid search, social, display, and other advertising categories. (Media buying will be covered in a separate RFP).
- e. Social Media Growth & Engagement: create content, deepen conversations, and grow communities. Develop and execute an Influencer strategy.
- f. Measurement & Optimization: expand our testing and optimization strategy, implement ongoing testing and optimization plans, and provide recurring reporting on leading and lagging KPIs.
- g. Online/offline integration: TechnoServe has a direct mail program that mails 1.3 million pieces per year (renewals and acquisition), we need a digital firm that can work with our direct mail agency to identify and pursue opportunities for integration.

## **WHAT TO INCLUDE IN YOUR PROPOSAL**

Please provide a maximum of three case studies that best demonstrate your approach, capabilities, and results in the following areas (Please include at least one nonprofit and provide examples of dashboards and / or reports as part of at least one case study):

1. What was your client's most difficult revenue challenge? How did you develop the solution that solved the challenge, and what were the results?
2. How have you helped a client with a little known brand break through the clutter to increase engagement and revenue?
3. How do you identify the larger, important conversations playing out in the world today, and how do you bring your clients into the conversation?

## **We would also like you to tell us about the following:**

- In what areas does your firm have the most expertise?
- What sets your firm apart from the others, and why?
- Tell us about your experience using Hubspot.
- How do you think digital marketing will change in the next five years?
- Percentage of nonprofit and for-profit clients.
- Program management process - what is your approach to managing project timelines and budgets? What tools and communication methods do you use internally and with clients to keep everyone aligned, organized and successful?
- What do you expect from clients in order to ensure a successful partnership?
- What is your firm's approach to ensuring a diverse and equitable team?
- Team member bios that will be assigned to this project and their role within the project:
  - Years of experience
  - Previous work
  - Time with firm
- Three client references we may contact.

## **PERIOD OF PERFORMANCE**

The period of performance of any contract resulting from this solicitation is anticipated to run from January 2021 to December 2022.

## **SELECTION CRITERIA**

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 elements 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 scope of work, 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 creative strategies, budget, designing and creating ad units, content and other creative assets, yearly schedules, reporting results, and coordination with other aspects of TechnoServe's fundraising operations.

The evaluation of each response to this RFP will be based on the requirements set out in the solicitation. Points will be assigned to the proposal based on the following criteria:

Capability to strategize and execute integrated digital marketing solutions that increase revenue and build brand awareness and engagement to the right audiences 25 points
Successful revenue generating campaign experience across digital channels 25 points
Analytics, Testing and Optimization expertise 25 points
Team assigned 15 points
Cost 10 points
<b>Total: 100 Points</b>

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

## SCHEDULE OF EVENTS

The following schedule of events should be considered definitive. TechnoServe reserves the right, however, to adjust any of these dates as necessary to meet its needs. In the event any of the dates are adjusted, TechnoServe will send information about the date changes to all vendors to whom this RFP originally was distributed, plus any other vendors that have made their interests known to TechnoServe.

1. Questions regarding this request may be addressed to Lisa Kagel at [lkagel@tns.org](mailto:lkagel@tns.org) and must be received no later than **August 24, 2020**. Firms that wish to receive the compiled list of questions and answers must indicate their interest in competing for the contract by **August 20, 2020**.
2. Responses to questions will be distributed to all interested parties no later than **August 28, 2020**.
3. Proposals responding to the RFP should be sent electronically addressed to the attention of Lisa Kagel, Senior Director Digital Engagement, at [lkagel@tns.org](mailto:lkagel@tns.org), and must be received no later than 11:00 pm EST on **September 14, 2019**.
4. Shortlisted firms will be notified by **September 24, 2020**.
5. Firm presentations **October 13 - 15, 2020**.
6. Award will be made in writing around **October 26, 2020**.

## **Term and Conditions**

1. The Request for Quote 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 on the RFP. 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 entire period provided by respondent.
5. All awards will be subject to TechnoServe contractual terms and conditions.
6. TechnoServe 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. TechnoServe reserves the right to accept all or part of the proposal when the award is provided.
8. All information provided by TechnoServe 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. TechnoServe is not responsible or liable for any use of the information submitted by bidders or for any claims asserted therefrom.
9. TechnoServe 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 TechnoServe, subject to claims of confidentiality in respect of the response and supporting documentation, which have been clearly marked confidential by the bidder.

## **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/individual in providing the type of services being requested by this RFP.
- 5) Include a contact name, email address, and telephone number to facilitate communication between TechnoServe and the submitting organization/individual.
- 6) Include a brief outline of the organization/individual and services offered, including:
  - a) Full legal name, jurisdiction of incorporation and address of the company.
  - b) 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.
  - c) 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.