

TechnoServe: Business Solutions to Poverty

Request for Proposal: Website Maintenance, Development and Design Support

Date: August 17, 2020



Subject: Request for Proposal

TechnoServe, Inc. (TNS) – Arlington, VA invites your firm to participate in this competitive solicitation to provide website maintenance, development and design support.

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.

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 to provide website maintenance along with development and design support as we continue to optimize our user experience to

- 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
- Donation Form: Integration between HubSpot, Deposit Fix, and WordPress
- 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 website maintenance, design and development services as detailed below.

SCOPE OF WORK

1. Content Management System Maintenance, services to include:
 - a) Core and plug-in security updates
 - b) Core upgrades
 - c) Module upgrades
 - d) Monitoring of site and server performance, proactively reporting issues and recommending resolutions
 - e) Monitoring file changes, proactively reporting issues and recommending resolutions
 - f) Management of hosting provider

2. Web Development and Design Support for enhancement and / or expansion of existing features and functionality based on A/B testing results, user research, and best practices. Services to include:
 - a) Backlog management
 - b) Project management
 - c) Application Development
 - d) Creative design and user experience

WHAT TO INCLUDE IN YOUR PROPOSAL

Please tell us about the following:

- 2-3 examples of website design / user experiences that your team created that successfully drove increases in revenue. Ideally, these should be from the team that would be assigned to TechnoServe.
- 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 with WordPress.
- Tell us about your experience with HubSpot and DepositFix.
- Tell us about any experience designing and developing donation forms for nonprofits and any specific donation platforms you have used. If you don't have any experience developing donation forms, please describe your experience with eCommerce experiences.
- 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?
- Describe your experience collaborating with digital marketing agencies to design and develop website enhancements and new features / functionality, including implementing technical SEO improvements
- 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 may 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,

- Content Management System Maintenance,
 - Details of services included frequency of different types of monitoring
 - Website elements that are monitored for performance (website speed, etc)
 - Tools used for monitoring and reporting
 - Monthly and / or annual cost for maintenance services
- Web Development and Design Support for enhancement and / or expansion of existing features and functionality
 - Website Backlog management process, including budgeting and project planning
 - Estimating process
 - Design and Development approach
- Line item breakdown of costs to include hourly rate vs. any blended rate options available if client purchases minimum number of hours

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 provide comprehensive website maintenance services 25 points
Web development and design experience that successfully increased revenue through an optimized website and user experience 40 points
Team assigned 15 points
Cost 20 points
Total: 100 Points

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 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, 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, if appropriate, **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 the 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
 - c) Chief Executive Officer, and all other officers and senior managers of the company.
 - d) 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.