

Request for Proposal

Date: 8/15/2022

Subject: Predictive analytics for driving individual online donations

Reference #: P0013308

Introduction: TechnoServe is an international nonprofit organization that helps people lift themselves out of poverty by harnessing the power of the private sector. Operating in almost 30 countries, we work with hardworking women and men 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.

General Requirements: The requirements for TechnoServe's anticipated contract are listed below. A more detailed Statement of Work is also attached.

TechnoServe's Digital Marketing team is looking for a data & analytics partner to perform advanced and predictive analytics to help TechnoServe better understand what drives donation revenue and how to optimize our marketing efforts over time. The contractor will: Develop a marketing attribution model and a predictive donor journey map; Optimize Creative assets; and, Develop custom GA4 reports and conduct team training on how to create custom reports.

Period of Performance: The period of performance of any contract resulting from this solicitation is anticipated to be between the start and end dates listed below.

Start Date: 11/1/2022

End Date: 12/31/2022

Proposal Content Instructions: In addition to responding to the Statement of Work, all proposals must:

- Describe the qualifications, experience, and capabilities of the firm or consultant in providing the type of services being requested. Resumes or CVs of the consultant or any key personnel of the firm shall be submitted as an attachment.

- Estimate the length of time required to accomplish all requirements, with detail on individual activity implementation dates, as referenced in the Statement of Work.
- Contain a detailed cost breakdown with applicable taxes and other charges clearly identified (and be presented in conformity with any further instructions included in the Statement of Work). Consultants should provide their daily or hourly billing rate, or their proposed fixed fee for the requested deliverables.
- Provide at least 3 references for similar contracts with a description of the services provided, value of the contract, and the contract periods of performance.
- Include a contact name, email address, and telephone number to facilitate communication between TechnoServe and the submitting firm or consultant.
- For proposals from a firm, provide a brief outline of the company 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, Chief Executive Officer, and/or all other principal officers of the company.
 - Year the business was established.
- If a consortium of firms or a team of consultants submits a proposal jointly, the above information should be provided for each member of the team.

To ensure consideration, all quotes must be submitted in the following language and currency, and by the due date noted below:

Language: English

Currency: USD

**Submission
Instructions:**

All proposals must be emailed to the address below with your proposal attached in one or more files (PDF preferred). You will receive an auto-confirmation upon receipt. DO NOT email your proposal to any employee of TechnoServe or deliver your proposal in hard copy to a TechnoServe office. **Failing to adhere to these instructions may make your proposal ineligible for consideration.**

Email: buy+US+P0013308@tns.org

Order of Events:

This procurement will be administered in accordance with the following dates (subject to change at TechnoServe's sole discretion):

Date	Event
8/24/2022	Last date that questions and notice of intent to bid will be accepted. Questions and answers will be distributed to all known interested parties, so questions should not disclose confidential information, and all interested parties should submit a notice of intent to bid by this deadline to ensure they receive a copy of TechnoServe's response to questions.

Questions and/or notice of intent to bid should be emailed to:

dlape@tns.org

8/29/2022 Date that answers to questions will be distributed to all known intended bidders.

9/16/2022 Last date that proposals will be accepted by TechnoServe.

**Terms and
Conditions:**

- The Request for Proposal is not and shall not be considered an offer by TechnoServe.
- All responses must be received on or before the date indicated on the RFP. All late responses will be rejected.
- All unresponsive proposals will be rejected.
- All proposals will be considered binding offers. Your proposal must be valid for acceptance for a minimum period of 90 days from the closing date of this solicitation.
- All awards will be subject to TechnoServe contractual terms and conditions and contingent on the availability of donor funding.
- TechnoServe reserves the right to accept or reject any proposal or cancel the solicitation process at any time, without assigning any reason, and shall have no liability to any vendors submitting proposals for such rejection or cancellation of the RFP.
- TechnoServe reserves the right to accept all or part of the proposal when awarding the purchase order/contract.
- All information provided by TechnoServe in this RFP is offered in good faith. Individual items are subject to change at any time and all known intended bidders will be provided with notification of any changes.
- TechnoServe reserves the right to require any bidder to enter into a non-disclosure agreement.
- Bidders are solely obligated to pay for all costs which may be incurred by the bidder or any third parties in connection with preparing the proposal.
- All proposals and supporting documentation shall become the property of TechnoServe and shall be treated confidentially.
- Bidders are required to identify and disclose any actual or potential Conflict of Interest.

**Criteria for
Selection:**

TechnoServe's evaluation of proposals will be based on the factors set out below. At the sole discretion of TechnoServe, bidders may be selected for follow-up questions or to provide an oral presentation. TechnoServe reserves the right to award the contract to the bidder whose proposal is deemed to be in the best interest of TechnoServe. TechnoServe will not award a contract to any bidder where there is indication of a lack of business integrity.

Max Points	Criterion
25	Price, inclusive of all delivery fees and taxes
30	Capability to apply key advanced & predictive analytics to answer key q's....
30	Demonstrated experience analyzing & recommending optimizations for market
15	Main team point of contact assigned to TechnoServe

The attached Statement of Work represents an integral part of this solicitation.

EXHIBIT 1: Statement of Work

Performance Location

United States

Background and Objective

The Digital Marketing team at TechnoServe is looking for a data and analytics partner to join our journey building and optimizing our digital presence, user experience, and revenue. We are looking for a partner that can develop actionable predictive analytics reporting that will lead to significant increases in revenue and brand engagement.

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, details provided below.

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 4 years we have redesigned our website, adopted HubSpot as our marketing platform, expanded our paid advertising program, and developed personas and provisional donor journeys to better understand our target audience.

We have taken a data driven approach applying A/B testing and predictive analytics to learn what works best, optimizing our efforts based on those learnings.

While we have made significant progress, we continue to face some challenges:

1. Crafting a succinct, inspirational message that captivates prospective donors.
2. Developing advertising assets that consistently drive traffic and donations.
3. Evolving our email marketing strategy and testing program to acquire new qualified donors, retain current donors, and increase traffic and donations.

TechnoServe Martech Stack

- CMS: WordPress and a variety of plug-ins.
- Host: Pantheon
- CRM Marketing Automation/ESP: Hubspot
- Optimization and Analysis: Google Analytics, Google Optimize, Crazy Egg, Yoast
- DAM: Third Light
- Editorial Calendar / Project Planning: CoSchedule
- Video: YouTube
- Donor Database: Blackbaud Raiser's Edge

Target Audience

Our marketing and fundraising efforts for digital fundraising focus on two personas: Jacob, the Global Citizen and Ann, the Devoted Giver.

Jacob - the Global Citizen, 55+



Helping someone develop confidence, make connections, and build their income feels very impactful to me. Cash donations will run out eventually.

”

Communication Style

- He likes straightforward communication that is honest and clear
- He is drawn to stories about women's lives, and triumph over difficulty
- Gravitates towards orgs. that have longer term commitment to the problem
- He appreciates data and a clear line between his actions and their impact

Goals, what are you working for?

- Giving back is something he was raised to do
- Supporting non-profits that are transparent, human and visionary
- Feeling like he is making a difference that is bigger than just giving money

Issue Perspective

- A long-time recycler and an early Tesla buyer, he believes strongly in supporting green initiatives
- He believes in small-farm agriculture and has sought out fair trade coffee beans
- He recognizes his privilege and that he must leverage it to help those who don't share in it

Motivations, why are you working for it?

- Family tradition of giving back
- desire to spread equity on a global level
- “pay it forward”
- raised awareness of the global need for assistance

Jacob - the Global Citizen, 55+

Lifestyle

- Higher Ed/Master's Degree
- \$200k Income
- \$1million in assets in addition to home
- East/West Coast
- Professional/Managerial Occupations
- International Travel

Over Indexes

- Male
- Jewish
- Homeowner

Salient Channels, Themes, Content

- News Reports, Friends and Family via Social Media
- Lasting change, opportunity to break the cycle
- Women's health and hunger, and education



Values

- Understands the wider world and has a larger view of community
- Sustainable, eco friendly lifestyle
- Open, agreeable, empathetic, caring
- Demonstrate intergroup empathy and caring

Watchouts

- Any perception that TS is “big business”
- Unclear paths to action
- Stories lacking emotion
- Concepts based purely on intuition; they should integrate data and logic

Areas of Interest

- Finance & Entrepreneurship
- Liberal Comedy
- Environment & Climate Resilience Education & Training
- Girls & Women Technology & Innovation

Ann, The Devoted Giver, 40+



Communication Style

- Ann likes meaningful information that is impactful and trust inducing

- Ann is drawn to the stories that demonstrate impact and show the effects other donors have had

✱ - Gravitates towards orgs. that have longer term commitment to the problem

Issue Perspective

- She is very aware that the pandemic has exacerbated already broken systems operating in the world

✱ - She uses donations as a method to feel like she is assisting others when she feels powerless

- works remotely and has access to the tools she needs in order to do her job - over the course of the pandemic has become acutely aware of her privilege incentivizing her willingness to give.

Contributing to a lasting solution to a real world problem is the only way I feel useful to those who are disadvantaged in this world.

Now that I have the ability to help, I feel it is my duty.

Goals, what are you working for?

- build relationships that fulfill her beyond meeting her basic needs in order to "pay it forward"

✱ - help create a lasting pathway out of the cycle of poverty

- find the good in the world

Motivations, why are you working for it?

- desire to spread equity on a global level

- "pay it forward"

- raised awareness of the global need for assistance

Ann, The Devoted Giver, 40+

Lifestyle

- Bachelors Degree
- 150k +
- Bay Area, CA
- Tech Professional - Management
- Average Donation Size: 250+

Over Indexes

- Female
- Raised Christian
- Renter

Salient Channels, Themes, Content

- News Reports, Friends and Family via Social Media
- Lasting change, opportunity to break the cycle
- Women's health and hunger, and education



Values

- Sees the opportunity to help others as a stem from her own personal success

- intentional and thoughtful about her purchases

✱ - strong, critical thinker, thorough researcher gravitates towards earnest and transparent organizations that equally demonstrate intentionality in their spending

Watchouts

- Ann wants to know who is working for the organization and how much they are making

- She wants the mission statement clear and the outcomes visible

- She wants a factual emotive story told with the financial reports and measured impact to back it up

Areas of Interest

- Technology & Entrepreneurship
- Liberal Comedy
- Foreign Affairs + International Relations
- Climate Change

Overlapping Qualities of Personas

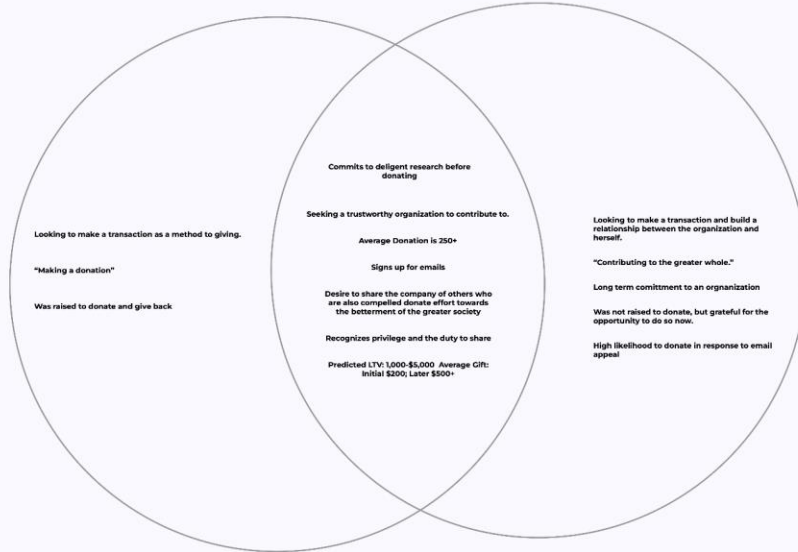


Jacob, the Global Citizen , Path #1

Jacob is an educated, sophisticated and financially well-off professional. He values data and logic and takes time to thoughtfully process information before acting.

Ann, the Devoted Giver , Path #2

Ann is an educated, ambitious and conscientious leader. She values impact and transparency and completes thorough research of the organization before donating.



Performance

Digital Marketing KPIs (Leading Indicators)	<u>2021 ACTUAL</u>	<u>2020 ACTUAL</u>
Revenue	\$376,701	\$330,841
Sessions (North America)	144,302	247,129
# of Donations	4,905	4,166
Average Gift	\$77	\$79
Conversion Rate	3.4%	2.41%

Contractor Tasks

We are looking for a data and analytics partner to perform advanced and predictive analytics to help TechnoServe better understand what drives donation revenue and how to optimize our marketing efforts over time.

1. Develop a marketing attribution model
2. Develop a predictive donor journey map
3. Creative asset optimization
4. Develop custom GA4 reports and conduct team training on how to create custom reports

Deliverables

- Marketing attribution model analysis accounting for both online and offline donations revenue.
- A journey map that details the steps of the donor journey, including an actionable tactical plan for the TechnoServe marketing team.
- Creative asset analysis based on predictive analytics that provides detailed tactical steps to optimize digital advertising performance.
- 5 custom GA4 reports and team training on how to create custom reports.

Deliverable Acceptance Standards

The Senior Director of Digital will review each deliverable and provide feedback and final approval on deliverables. The contractor and Senior Director will agree on the rounds of review/numbers of revisions and acceptable time frames for each round of review.

Operation and Logistical Considerations

Point of Contact: While the Senior Director of Digital will be the primary point of contact for the agency partner, other members of TechnoServe's digital, communications, and fundraising team may also participate in meetings and reviews. In addition, the agency partner may also be asked to participate in discussions and meetings with TechnoServe creative, media, or web development partners.

Timelines and budgets: As specific projects are identified, the agency partner will be responsible for providing a project timeline and budget when the project begins and manage to the milestones and costs agreed upon in the schedule. It is understood that circumstances may sometimes require a change in schedule or costs and that the agency partner will be responsible for discussing and getting approval for any proposed adjustments with TechnoServe prior to making any changes.

PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this solicitation is anticipated to run from November 2022 to December 2023, with an opportunity for two automatic renewal periods through December 2025.

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:

1. How do you apply advanced and predictive analytics to answer key business questions that grow client revenue?
2. What is your process for analyzing and recommending optimizations for marketing collateral?
3. How do you assess the most effective mix of marketing tactics and how can that be applied to maximize ROI?

We would also like you tell us about the following:

1. What sets your firm apart from others, and why?
2. Percentage of nonprofit and for-profit clients.
3. Team member bio of our main day-to-day point of contact.
4. Three client references we may contact.

Please provide a detailed pricing breakdown as follows (please specify estimated rounds of revisions and duration for completing each type of deliverable):

- Marketing attribution model analysis accounting for both online and offline donations revenue (assume you will present during a team meeting).
- A journey map that details the steps of the donor journey, including an actionable tactical plan for the TechnoServe marketing team.
- Creative asset analysis based on predictive analytics that provides detailed tactical steps to optimize digital advertising performance.
- 5 custom GA4 reports and team training on how to create custom reports.

SELECTION CRITERIA

Criteria	Maximum Points
Capability to apply key advanced and predictive analytics to answer key business questions that grow client revenue.	30
Demonstrated experience analyzing and recommending optimizations for marketing collateral and customer journeys that increase revenue and improve marketing ROI.	30
Main team point of contact assigned to TechnoServe	15
Cost	25
TOTAL	100

SCHEDULE OF EVENTS

1. Questions regarding this request may be addressed to dlape@tns.org and must be received no later than **August 24, 2022**. Firms that wish to receive compiled list of questions and answers must indicate their interest in competing for the contract by **August 24, 2022**.
2. Responses to questions will be distributed to all interested parties no later than **August 29, 2022**.
3. Proposals responding to the RFP should be sent electronically and addressed to: XXXX and must be received no later than **September 16, 2022**.
4. Shortlisted firms will be notified by **September 26, 2022**.
5. If needed, TechnoServe will schedule video conferences with shortlisted firms the weeks of **October 10 or October 17, 2022**.
6. Award will be made in writing around **October 26, 2022**.