

# Request for Proposal

**Date:** 11/2/2023

**Subject:** Front-End Website Refresh: Seeking Creative Services Agency

**Reference #:** P0025112

**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.

TNS is seeking a creative services agency with a proven track record in front-end tasks, such as design, UI/UX, and copywriting, particularly in successfully executing website refresh projects. TNS intends to establish a comprehensive Master Service Agreement with the selected agency. Our main objective is to grow unrestricted giving, while also acquiring new email names and building brand awareness and engagement through our digital channels.

**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:** 11/20/2023

**End Date:** 11/20/2024

**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+P0025112@tns.org

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

<b>Date</b>	<b>Event</b>
11/6/2023	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:

[jmhernandez@tns.org](mailto:jmhernandez@tns.org)

11/7/2023 Date that answers to questions will be distributed to all known intended bidders.

11/13/2023 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.

<b>Max Points</b>	<b>Criterion</b>
20	Price, inclusive of all delivery fees and taxes
30	Relevant Experience and Expertise
10	Adherence to Timeline and Collaboration Skills
10	Understanding of TechnoServe's Mission
30	Creative Approach and User Engagement Strategy

**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 creative partner to participate in a Website refresh.

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, and 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.

In 2019, we did a full website redesign and migration to Wordpress. Four years later, we are ready to give our site look and feel a facelift to ensure it feels up-to-date, meets accessibility standards, and delivers an optimal user experience.

The main activities will be to:

1. Assess and update site navigation based on audience needs and business objectives.
2. Provide an updated look and feel based on current best practices, the updated TechnoServe visual style guide, and user experience.
3. Update and author key pages including design, layout, and content

Our website is built on WordPress. It was originally developed using the Classic Editor and part of this project will be to work with our website backend development partner to create new templates and patterns using the WordPress Block editor based on the refreshed design and key page updates. The selected partner for this project will then author the selected pages.

### **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
- \$1 million 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+



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.

## 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

”

## 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

## 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.

## 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



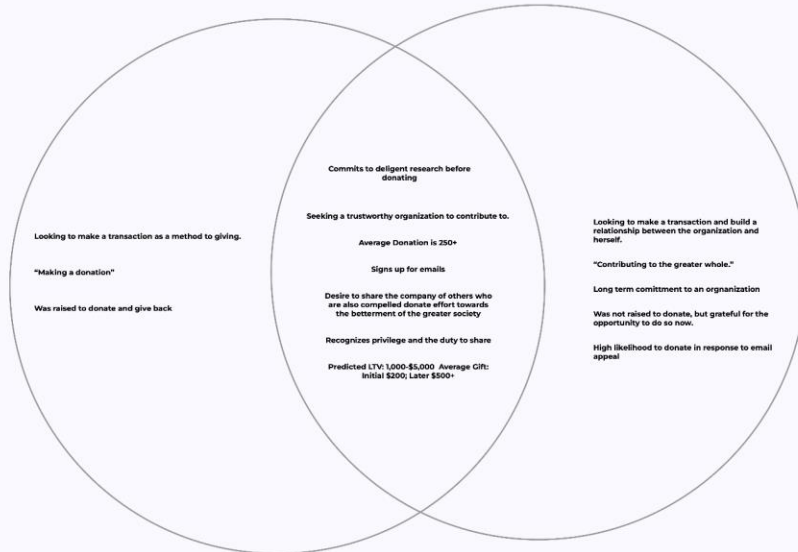
Jacob, the Global Citizen , Path #1

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.



## **Content Strategy**

The mission of TechnoServe's content is to inspire, educate, and inform our audiences to join us in the fight to end poverty, leveraging our impact and extensive experience in making a difference working with small business owners and farmers in low-income communities in Africa, Latin America, India, and the Caribbean.

While fighting poverty is our main focus, our content often includes these key themes that both reflect TechnoServe strengths and expertise and areas of audience interest:

1. Agricultural development
2. Enterprise development
3. Food security and food systems
4. Gender equality
5. Regenerative business/agriculture

We concentrate our communications across channels throughout the year in order to provide consistent content to engage audiences interested in these topics and advance them down the marketing funnel.

Communications in the fourth quarter of the year focus primarily on eliciting donations from our individual donor audience. While campaign themes for this quarter have varied, recent analysis indicates that the notion of empowering individuals and families to lift themselves out of poverty is one of the most compelling potential messages for our audiences. Our campaign this year is focused on the theme: A Different Way to Make a Difference.



## Contractor Tasks

We are looking for a digital marketing partner to perform the following activities:

1. Evaluate our current website content, messaging, and UI/UX and provide recommendations for a site refresh.
2. Implement approved recommendations from the evaluation. This should include a refreshed site design based on reusable WordPress templates / block patterns taking a mobile first approach.
3. Author and publish new pages based on the design.

## Deliverables

- Detailed documentation of high-level content, messaging, and UI/UX recommendations.
- Designs and wireframes for mobile and desktop versions of the following that can be handed off to our backend development partner for any new builds that are required:
  - Home page, Blog, Contact Us
  - Interior pages (up to 4 different templates)
  - Up to 8 modules
  - Optimized primary and secondary navigation
- Authoring and publishing pages based on the approved designs and wireframes

## 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 analytics, 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 any proposed adjustments with TechnoServe prior to making any changes.

## Evaluation criteria:

**Financial offer (20 points):** A comprehensive breakdown of the total project cost, including itemized expenses for design, development, and any other relevant services, with clear payment schedule and terms.

**Relevant Experience and Expertise: (30 points)** Clear demonstration of prior successful website refresh projects and expertise in UI/UX design and WordPress authoring.

**Adherence to Timeline and Collaboration Skills: (10 points)** Plan for adhering to timelines and budget constraints and demonstration of effective collaboration with the Senior Director of Digital and other team members, as well as potential collaboration with external partners.

**Understanding of TechnoServe's Mission: (10 points)** Demonstrate an understanding of TechnoServe's mission.

**Creative Approach and User Engagement Strategy: (30 points)** Specific examples for addressing challenges related to crafting compelling messages and creating effective digital assets to drive traffic and donations.