



Terms of Reference

Individual Giving Digital Marketing Support

August 2021

Background

The United Nations Development Programme's (UNDP) Bureau of External Relations and Advocacy (BERA) has recently formed a new unit to accelerate progress towards achieving Agenda 2030 while raising non-traditional revenue streams and dramatically increasing the organization's advocacy reach. The Innovative and Digital Partnerships unit is in need of a cause marketing / digital fundraising agency with a strong direct marketing expertise to build a pipeline of individual donors, building on the success of UNDP's development of a foundational digital marketing and fundraising infrastructure in 2020 and early 2021.

The agency will have a unique opportunity to establish a structure that will support all ongoing digital fundraising, starting with 2021-2022 activities, including:

- 1) Launch a refreshed strategic digital marketing plan to support UNDP's central giving campaigns and create a roadmap to enhance [marketing automation](#) of its corporate fundraising platform ([give.undp.org](#) in [English](#), [Spanish](#), [French](#), and [Japanese](#), estimated 65% overall allocation);
- 2) Support UNDP [Representation Offices](#) (ROs), thematic units and Country Offices (COs) with new campaigns as they arise (estimated 15% overall allocation);
- 3) Advance the use of marketing technology wherever possible and appropriate, particularly in the area of measurement and marketing automation (estimated 15% overall allocation); and
- 4) As needed, support other units (e.g., UN Volunteers, UNDP Shop, etc. estimated 5% overall allocation).

Current Fundraising Infrastructure and Objectives

FUNDRAISING: UNDP utilizes a best-in-class fundraising platform (Classy.org, Mailchimp) to support individual giving and is continually interested in utilizing the feature set to provide opportunities for all stakeholders utilizing the platform to optimize its utility.

PAYMENT PROCESSING: All donations are currently processed by WePay. In 2021 UNDP expects to begin to utilize [Classy Pay](#), which would enable both ACH payments as well as mobile wallet functionality, providing increased flexibility for donors worldwide. UNDP seeks support to strengthen the overall user experience for different forms of payment.

TAX-DEDUCTIBLE DONATIONS: All donations to the central Classy.org campaign in English are currently funneled through a [generic checkout page](#), with the option for donors seeking tax receipts in the US to give through the [UNF's dedicated page](#). In 2021 UNDP may also begin to support certain country offices as they develop their own campaigns on the UNF account supporting UNDP on Classy.org, so that US tax deductible donations are also possible for them. UNDP seeks support to strengthen the overall user experience for these journeys and provide CO support as necessary.

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EMAIL: UNDP utilizes MailChimp to distribute monthly newsletters to our audience of ~200K subscribers. However, UNDP would like to optimize the effectiveness of this important channel as a lead generation tool, and for email automation to new donors. UNDP is considering new platforms to meet these needs, such as Pardot.

PAID SOCIAL and GOOGLE AD GRANTS: UNDP has paid media accounts with Google and Facebook/Instagram, unrestricted use a Google ad grant account through the end of 2021, as well as organic social media presences on [Facebook](#), [Twitter](#), [Instagram](#), [YouTube](#), and [Linkedin](#). UNDP would like the agency to develop a holistic channel plan to leverage and optimize the effectiveness of these important channels through a dedicated advertising budget, improved creative and insight based reporting, while also facilitating training of key UNDP resources to plan, create, launch, and report on paid media campaigns.

WEB: UNDP's COVID-19 response is evolving to include green recovery and other important strategic focus areas. In both central and country office-based fundraising, UNDP would like to ensure the consistency and transparency of these messaging areas in order to align strategic priorities across the organization.

Scope

PHASE ONE: Q4 2021 (October 1 – December 31, 2021)

- By mid-November, develop and implement a new nature/environment-themed campaign, aligned with the launch of, and building upon traffic generating from, BERA's global Climate & Inequality campaign. Leveraging results and learnings from 2020 CALENDAR YEAR END (CYE) campaigns, develop and deploy 2021 CYE outreach and marketing plans, emphasizing compelling digital storytelling to inspire donors to take action to achieve Agenda 2030.
- Design a concrete multi-phased plan to enhance UNDP's corporate giving platform and pipeline through [marketing automation](#), including [lead generation](#), [email automation](#), [matching gifts](#), and other [automation tools and hacks](#) available through Mailchimp and available integration tools. Implement initial phase of plan.
- Provide monthly optimization, troubleshooting, and reporting of on ongoing paid media campaigns and Google Ad grant ads, including those driving to crowdfunding campaigns, [give.unv.org](#) and [shop.undp.org](#). Revise spending limits to reflect central UNDP budget increases (previously USD\$30K per quarter, now USD\$50K per quarter).
- Provide support for new payment processor: Classy Pay.
- Provide support to strengthen the overall user experience for donors making US tax-deductible donations through updated central journeys, as necessary.
- Provide support to UNV's new focal point for individual giving.

PHASE TWO: Q1 2022 (January 1 – March 31, 2022)

- Create campaign reports for both UNDP and UNV (2020 media budget = ~USD\$23K into 2021), including ad grant ad performance and key insights and recommendations for 2022 plans. Develop a POV as to whether nature/environment theme can serve as a viable platform for

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evergreen fundraising for UNDP, or whether another theme (e.g., UNDP's sustainable project work across the globe) should be tested.

- Execute/optimize subsequent phases of fundraising platform enhancement / marketing automation roadmap developed in Phase One.
- Update country office/crisis crowdfunding toolkit materials to release 2022 Individual Giving offer to UNDP network.
- Assess needs for a full calendar year 'always on' digital ad campaign.
- As needed, support one or more [Representation Office](#)-led campaigns (e.g., Nordics/Germany/Japan), thematic campaigns (UN Women/RBAS Women Entrepreneurs), or alternate global giving window timeframes (e.g., Ramadan, Diwali), etc.

PHASE THREE: Q2 2022 (April 1 – June 30, 2022)

- Execute/optimize subsequent phases of fundraising platform enhancement / marketing automation roadmap developed in Phase One.
- Implementation of always on campaign plans derived in PHASE TWO.
- As needed, support adoption of one or more [Representation Office](#)-led (e.g., Nordics/Sweden), Crowdfunding Academies (CFAs), thematic campaigns (UN Women/RBAS Women Entrepreneurs), or alternate global giving window timeframes (e.g., Ramadan, Diwali), etc.

PHASE FOUR: Q3 2022 (July 1 – September 30, 2022)

- Deliver mid-year campaign report with key recommendations.
- Execute/optimize subsequent phases of fundraising platform enhancement / marketing automation roadmap developed in Phase One.
- Implementation of always on campaign plans derived in PHASE THREE.
- As needed, support adoption of one or more [Representation Office](#)-led (e.g., Nordics/Sweden), Crowdfunding Academies (CFAs), thematic campaigns (UN Women/RBAS Women Entrepreneurs), or alternate global giving window timeframes (e.g., Ramadan, Diwali), etc.
- Prep for CYE campaigns with refreshed focus on theme and messaging, given current context.

Functional Area	Phase 1	Phase 2	Phase 3	Phase 4
Fundraising platform enhancement / marketing automation	L	L	L	L
Country Office (CO) campaigns / UNV / UNDP Shop	S	S	S	S
UNDP Central campaigns	L	L	L	L
UNDP Representation Office / Thematic Giving / Alt Time Window	S	S	L	L

KEY:

L=Lead campaign development

S=Support as needed



Service Provider Requirements

Service providers should possess team members with seven or more years of strategic and hand-on experience with three or more of the following service categories: Digital marketing, digital fundraising, digital advertising, advocacy, organic social media, creative strategy and design, and marketing automation. Preferred vendors will have direct experience building successful marketing automation initiatives for one or more charitable organizations as well as direct experience using the Classy.org platform to develop successful fundraising campaigns.

Contract Duration

The service provider will enter into a one-year agreement with UNDP, subject to a one-year extension. Financial proposals should be based on a flexible team structure of at three to four key personnel—including a media specialist, project manager, MarTech strategist/planner, and /or designer—dedicated to the account for 10-25% of their time on a monthly basis.

Fees

The service provider is required to submit an itemized financial proposal for its product and services, including pricing for phases as outlined. Interim payments will be made each quarter upon successful completion of each phase.

Evaluation

Proposals will be evaluated against the following criteria:

- Bidder's qualification, capacity, and experience (35%)
- Proposed Methodology, Approach and Implementation Plan (35%)
- Management Structure and Key Personnel (30%)