

Statement of Purpose

United Way of Buffalo & Erie County (UWBEC) is seeking agency support to create and execute aspects of the 2024-2025 annual fundraising campaign. The primary objective is for UWBEC Marketing & Communications staff to effectively collaborate with a marketing agency to provide professional messaging, marketing, advertising and communications strategy for the annual fundraising campaign, which runs from late August - March 31st and will have a goal of \$8.5-10 million.

Background

United Way of Buffalo & Erie County envisions an equitable, thriving and united community achieved through collaborative leadership.

We bring people, organizations and resources together to create systemic community change, breaking a cycle of hardship that affects 40% of Erie County families. To achieve this mission, UWBEC:

- Leads and supports coalitions and collaborative efforts in the community in line with our impact priorities within the areas of health, education and financial stability.
- Leverages local, state and national data on ALICE (Asset Limited Income Constrained Employed) individuals to inform priority focus areas. Those who fall into this category are living above the federal poverty line but still struggling to financially thrive.
- Advocates to local, state and national lawmakers regarding issues affecting the well-being of Erie County residents.
- Raises funds through an annual campaign in local workplaces and among individual donors that raised \$9.1 million in 2022-2023.
- Invests millions of dollars each year in high-quality local health and human service programs focused on priorities within health, education and financial stability.
- Connects community volunteers with opportunities within the organization and with other area nonprofits.
- Builds the capacity of local nonprofits through training and technical assistance.

Challenges & Changes

United Way of Buffalo & Erie County recognizes that there are challenges that will need to be addressed for a successful campaign to occur. The main barrier that UWBEC faces is a limited understanding of the work that UWBEC does in the community.

The second challenge is that many in Buffalo and Erie County believe that UWBEC is simply a pass-through organization that provides funding to other non-profit organizations. They don't recognize that the bulk of our programming at UWBEC serves to create systemic change in Buffalo and Erie County by improving healthy outcomes, enhancing youth education and creating financial stability. In addition, programs like Work/Life Solutions, Girls In Sports, VolunteerWNY and 211 serve much of Western New York.

A final consideration is that the current economic conditions have forced many households to cut back on their overall charitable giving. That, combined with changes to how we work (hybrid, remote) are also things to consider.

To address some of these challenges UWBECC is currently engaged in a website redevelopment project that is expected to launch prior to the campaign. This new website will provide a more streamlined and engaging view into the work of UWBECC.

Additionally, our parent organization, United Way Worldwide, is currently undertaking a brand refresh and is expected to roll out updated assets over the summer with a goal of having individual United Way locations adopt the new branding in Q4 of 2024. More details on this will be provided to the agency with the winning proposal upon signing a nondisclosure agreement.

Scope of Work

In cooperation with UWBECC, the selected agency will create messaging, collateral and a specific marketing plan to help achieve the fundraising goal of the annual campaign. The list below includes a sample of the requested services in order of priority.

- Strategic research for identifying and targeting new donor groups.
- Develop campaign messaging.
- Develop and implement a marketing plan to achieve the fundraising goal.
- Create a coordinated advertising campaign (print, broadcast, digital, online, postal mail, email, etc.).
- Create a short commercial fundraising video for showing to prospective donors and other community groups.
- Present other effective fundraising ideas that are not necessarily listed here.

The selected agency must work closely with UWBECC staff to ensure that the marketing campaign's messaging and imagery is in alignment with brand standards. The budget allocated for this project is approximately \$40,000 inclusive of ad spend. Agencies should consider this budget for the purpose of preparing proposals. Please also keep in mind that UWBECC is a nonprofit charitable organization.

Qualifications

The selected firm must demonstrate the ability to strategically plan, integrate, manage and execute an assortment of marketing projects. The selected agency also must demonstrate a successful track record of developing and implementing fundraising campaigns for nonprofit organizations.

Bid Procedures and Evaluation

Questions may be submitted in writing to Kaley Donaldson, Marketing Manager, United Way of Buffalo & Erie County, at kaley.donaldson@uwbec.org by 5 p.m. on Wednesday, April 10, 2024. Additional information and/or clarifications based on written questions will be provided to all bidders on the UWBECC website (<https://www.uwbec.org/marketing-rfp>) by 5 p.m. on Thursday, April 11, 2024. Verbal questions or questions submitted after the deadline listed above will not be considered.

Agencies interested in submitting a proposal must do so by 5 p.m. on Wednesday, April 17, 2024. Proposals should be submitted via email to Kaley Donaldson at kaley.donaldson@uwbec.org and should be clearly labeled “*UWBEC 24-25 Campaign Marketing RFP Response.*” Links to online sources may be used to feature samples of electronic or broadcast work; if additional supporting files are too large to be emailed a link to a file sharing service (Google Drive, Dropbox, etc.) may be provided. **Late proposals will not be accepted or considered. It is the responsibility of the bidder to ensure the proposal is submitted prior to the proposal date.**

As part of the proposal, applicants are asked to address the following:

- Company Background
- Summary of services & capabilities
- Description of the strategic approach used in campaign creation
- Description on how the project would be organized and executed
- Pricing
 - Include detailed pricing on all aspects of the project, including pertinent à la carte options.
 - Please indicate required vs. optional additional expenses (e.g. content provided by agency vs content provided by UWBECC, etc.)
 - Requested payment schedule
 - Project fees: detail associated costs (e.g., travel) that are not included in the proposal (if applicable)
 - Other costs: indicate whether you foresee any additional costs
- Proposed Timeline
- Client references (preferably industry-specific)
- Agency commitment to equity, diversity and inclusion, as well as team demographics
- Name and contact details of persons to be approached for clarification of the quote if needed

After proposals are opened, a bidder may be given an opportunity to explain any error, and may request their proposals be withdrawn. Errors determined by UWBECC to be minor may be allowed in an otherwise acceptable proposal. The contract will be awarded based on best value as determined by UWBECC.

After proposals are opened, UWBECE staff will select a subset of applicants for an interview. Agencies chosen to proceed will be contacted via email by Friday, April 26, 2024. All interviews will be conducted between Monday, May 6 - Wednesday, May 8, 2024.

Evaluation Criteria

Each proposal will be analyzed to determine overall responsiveness and qualifications under the RFP. Criteria to be evaluated may include the items listed below. Additional information may be requested from agencies during the interview process. UWBECE reserves the right to select one, or more, or none of the agencies to provide services.

Evaluation Criteria:

Creativity 30%

Relevant experience 15%

Success with similar campaigns 15%

Project planning 15%

Cost 15%

Background and qualifications 10%

Timeline

The desired campaign start date is early September. Printed campaign materials would need to be in house by August 12, 2024.

The RFP timeline is as follows (subject to change):

RFP Release: 4/1/24

Deadline for Questions: 4/10/24

Proposals Due: 4/17/24

Meetings with Finalists: 5/6/24 -5/8/24

Announcement: 5/10/24

All proposals should be received by 5:00 pm EST on April 17, 2024. Please submit your quote by e-mail to kaley.donaldson@uwbec.org (pdf preferred).