



SCOPE OF SERVICES REQUIRED

Offline Acquisition and Integration Agency SOW

The purpose of this scope of services is to procure a strategic Offline Acquisition and Integration Agency Partner. As MMUSA transitions to a unified acquisition team, we require a partner who can develop and implement integrated strategies that maximize impact across both offline and digital channels — breaking down historical silos between these programs.

The selected Agency Partner will provide expertise in direct mail acquisition strategy and execution, multi-channel integration and co-targeting, high net worth donor acquisition, telemarketing acquisition, and cross-channel measurement and optimization. The company will work closely with the IRC Acquisition & Digital Marketing team and other vendor partners, including the Direct Mail Production Vendor, to ensure strategic alignment, operational efficiency, and measurable performance across all acquisition channels. Note that this SOW excludes paid digital acquisition and face-to-face acquisition services, which are provided by other vendor partners.

This partnership is expected to drive donor file growth, improve acquisition economics, increase donor lifetime value, and support the long-term sustainability of MMUSA's fundraising programs.

Period of Performance

To be confirmed later, after the hiring of the vendor. 

Place of Performance

Most services will be performed at the Agency Partner's offices, with strategic planning, campaign development, reporting, and cross-channel coordination conducted remotely or on-site as needed. The Agency Partner will also coordinate with MMUSA's Direct Mail Production Vendor, digital advertising partners, telemarketing vendors, and other third-party partners as required to execute integrated acquisition campaigns.

The Offline Acquisition and Integration Agency Partner must demonstrate the operational capacity to manage strategic planning, campaign execution, vendor coordination, cross-channel integration, and performance reporting while ensuring alignment with MMUSA's fundraising objectives and compliance with all applicable regulations and industry standards.

Work Requirements



The Offline Acquisition and Integration Agency Partner will provide strategic leadership and operational support for MMUSA's donor acquisition programs across direct mail, digital co-targeting, telemarketing, and other channels. They will serve as the primary offline acquisition and integration strategy partner and will oversee the planning, development, execution, reporting, and optimization of integrated acquisition campaigns.

Key work requirements include, but are not limited to the following:

1. Strategic Planning and Multi-Channel Integration

- Collaborate with MMUSA to design multi-channel acquisition campaigns that leverage the strengths of both offline and online channels, with the goal of acquiring new donors and improving overall campaign performance.
- Develop integrated acquisition strategies that coordinate direct mail, digital co-targeting, and telemarketing efforts to maximize impact; strengthen online acquisition efforts with coordinated offline touchpoints; and minimize audience overlap or cannibalization.
- Manage data processes across channels, including (but not limited to) list rentals, data requests from internal databases, coordination with modelers and co-ops, accurate and timely suppression lists.

2. Direct Mail Acquisition – Strategy and Execution

- Develop and execute direct mail acquisition campaigns, including creative development (copy and art), list strategy and planning, merge-purge coordination, segmentation, and production oversight in coordination with the Direct Mail Production Vendor.
- Expand direct mail acquisition volume to grow the donor file at scale while managing cost-per-acquisition targets.
- Develop and manage list plans, including prospecting universe identification, list sourcing, models, and list exchange/rental strategy.
- Develop a testing strategy that balances innovation and learnings with revenue targets and risk.
- Ensure that campaigns stay on schedule and within budget.

3. Special Audiences Acquisition

- High Net Worth Donor Acquisition - Develop and implement strategies to identify, target, and acquire donors with significant life-time giving potential. DAF, IRA, and Stocks Donor Acquisition - Develop strategies to identify, target and acquire donors who give via DAFs, IRAs, or stocks.
- Sustainer Acquisition - Develop strategies to identify, target and acquire donors who give on a regular basis (monthly, quarterly, annual).
- Mid-level and Major Gift Acquisition - Develop and implement strategies to identify, target, and convert high-potential leads into mid-level and major gift prospects (\$250-



\$19,999). Note that the IRC is open to vendors submitting bids for Special Audiences Acquisition services only.

4. Digital Co-Targeting and Integration

- Layer coordinated digital advertising to offline acquisition audiences to improve response rates and drive multi-channel engagement.
- Manage co-targeting strategy and execution in coordination with MMUSA's digital advertising partners.
- Test and optimize co-targeting approaches, audiences, creative, and timing to maximize incremental lift.

5. Telemarketing Acquisition

- Launch and manage a telemarketing acquisition program, including a pilot designed for rapid deployment during a humanitarian emergency or other crisis moment.
- Build vendor partnerships and operational infrastructure to quickly activate outbound calling campaigns that convert high-intent prospects when giving urgency is elevated.
- Test baseline acquisition performance outside of emergency windows to establish ongoing program viability. Implement telemarketing outreach to convert high-potential leads.

6. Test-and-Learn Methodology

- Develop and execute campaigns with a structured test-and-learn methodology, ensuring that results can be measured, compared, and optimized over time.
- Design testing frameworks that isolate variables across channels, creative, audiences, and offers to inform future strategy.
- Document and share test results and strategic recommendations with MMUSA on a regular cadence.

7. Cross-Channel Measurement and Reporting

- Create an evaluation framework that assesses campaign performance holistically, rather than in channel silos. This includes identifying key performance indicators (KPIs), designing reporting structures, and analyzing the overall impact of integrated campaigns.
- Provide regular reporting and analysis of direct mail acquisition performance, including matchback reporting.
- Report on telemarketing and co-targeting performance within the integrated measurement framework.
- Deliver strategic recommendations based on data-driven insights to continuously improve program performance.

8. Innovation



- Advise and inform on emerging practices, tools, and approaches that strengthen cross-channel integration or individual channel performance.
- Recommend new tactics based on data-driven insights and industry trends.
- Develop an implementation plan for these new practices that include KPIs and measures of success.

Schedule/Milestones

The following schedule outlines the anticipated milestones associated with the procurement, evaluation, and implementation of a Direct Mail Acquisition and Integration Agency Partner.

- € **Issue Request for Proposal:** May 18th, 2026
- € **Suppliers return signed Intent to Bid forms due date:** May 22nd, 2026
- € **Questions from Suppliers due date:** May 27th, 2026
- € **Answers to Suppliers questions due date:** May 28th – 29th, 2026
- € **Bid submission due date:** June 23rd, 2026
- € **Bid Opening and Evaluation date:** June 24th – July 1st, 2026
- € **Finalist Vendors Notification for Presentations:** July 2nd, 2026
- € **Vendors presentation (In-person IRC HQ office, NY):** July 13th – 15th, 2026
- € **Vendors selection:** July 20th – 24th, 2026
- € **Contract negotiation with finalists:** July 27th – 14th August, 2026
- € **Award of Business:** End of August, 2026
- € **Contract start/ Onboarding & implementation:** Early September, 2026

Acceptance Criteria

Deliverables under this Scope of Services will be considered acceptable when they meet the agreed-upon strategic objectives, quality standards, timelines, and performance requirements defined by MMUSA and communicated during project planning.

Examples of Acceptance Completion:

- **Strategic Planning and Campaign Development** – Multi-channel acquisition strategies and campaign plans are developed in collaboration with MMUSA, incorporating input across direct mail, digital, and telemarketing channels, and are approved prior to execution.
- **Creative Development and Approval** – All creative concepts, copy, art, and final production files are reviewed and approved by MMUSA prior to release to the Direct Mail Production Vendor or other execution partners.
- **List Strategy and Data Coordination** – List plans, merge-purge specifications, and segmentation strategies are developed, documented, and approved by MMUSA prior to execution. Data files are processed accurately and delivered to the Direct Mail Production Vendor on schedule.



- **Cross-Channel Integration and Co-Targeting** – Digital co-targeting campaigns are coordinated with direct mail deployment schedules and executed according to the approved integration strategy.
- **Budget and Cost Management** – Programs are managed within approved budgets and cost-per-acquisition targets. The Agency Partner proactively communicates any projected variances and recommends corrective actions.
- **Test Design and Execution** – Test plans are documented, approved by MMUSA, and executed according to the agreed methodology. Results are analyzed and reported with actionable recommendations.
- **Reporting and Performance Analysis** – The Agency Partner provides required reporting and analysis on an agreed cadence, including campaign performance, cross-channel metrics, match-back results, test outcomes, and strategic recommendations for continuous improvement.
- **Telemarketing Program Management** – Telemarketing programs are launched, managed, and optimized in accordance with approved plans, vendor agreements, and performance benchmarks.

Other Requirements

The Offline Acquisition and Integration Agency Partner must maintain strict confidentiality and implement appropriate administrative, technical, and physical safeguards to protect MMUSA donor and prospect data from unauthorized access, disclosure, or misuse. Donor data may only be used for approved acquisition campaigns and must be securely transmitted, stored, and shared only with authorized personnel or approved third-party partners who adhere to the same security standards. The Agency Partner must promptly report any suspected or confirmed data security incidents and securely return or destroy all donor data upon termination of any agreements.

The Agency Partner must also ensure compliance with all applicable federal, state, and local regulations governing charitable solicitation, telemarketing, data privacy, and direct mail fundraising, including but not limited to Do Not Call regulations, state registration requirements, and USPS mailing standards.