HELPAGE INDIA Procurement of Digital Marketing Agency for Diaspora Digital Marketing Support

HELPAGE INDIA

Request for Proposal (RFP)

About HelpAge India

HelpAge India is a non-profit organization dedicated to serving the elderly population in India. It was established in 1978 and has since been actively involved in various initiatives aimed at improving the quality of life for senior citizens. HelpAge India runs various programs and services to address the needs of older persons. These include Shelter support for destitute elderly, healthcare services, elder helplines, livelihood support, advocacy for elder rights, and disaster relief efforts tailored to the elderly population.
In order to meet our digital marketing requirements for Digital Performance Marketing (Google, META and Linkedin) to strengthen HI's diaspora digital marketing and fundraising invites proposals from experienced digital marketing agencies as per details, terms, and conditions given below:

Current Digital Landscape

HelpAge India has an established online donation ecosystem designed to enable and support diaspora giving, with digital fundraising being an integral part of its overall fundraising efforts for several years. A fully functional website and Google Analytics and other measurement tools enable effective tracking of donor journeys, campaign performance, and conversions.

HelpAge India also leverages major digital advertising platforms, including Google, Meta, LinkedIn, and others, to drive awareness, engagement, and donations. Building on this strong digital foundation, the opportunity is to further strengthen diaspora awareness, engagement, and support particularly among the US Indian diaspora and convert this into deeper donor relationships and sustained digital fundraising.

Context and Rationale

In an increasingly digital-first ecosystem, HelpAge India seeks to strengthen awareness, engagement, and support among the global Indian diaspora, with a primary focus on the US market. The objective is to build greater visibility and affinity for its mission, foster a stronger community of diaspora supporters, and translate this engagement into sustainable donor relationships and increased contributions.

HelpAge India therefore invites experienced performance marketing agencies from across India to help build and scale a data-driven digital diaspora engagement and fundraising ecosystem. The engagement will leverage performance marketing, audience intelligence, AI-enabled solutions, and industry best practices to identify, reach, engage, nurture, and mobilise high-potential diaspora audiences.

The partnership will focus on creating measurable digital journeys across awareness, engagement, community building, donor acquisition, and fundraising, while strengthening long-term relationships with diaspora supporters and improving fundraising efficiency.

Ultimately, HelpAge India aims to establish a scalable diaspora awareness-to-support and fundraising engine that drives greater reach, deeper engagement, stronger advocacy, and sustained digital contributions, particularly within the Indian diaspora.

The selected agency will be responsible for media strategy, media buying, campaign management, creative production/adaptation, audience development, remarketing, optimization, measurement and reporting across Google Ads, Meta and LinkedIn.

Scope of Work

1. Media Strategy & Planning

- Develop the overall six-month paid media strategy aligned with HI marketing and fundraising priorities.
- Recommend channel mix, audience strategy, campaign architecture and budget allocation across Google Ads, Meta and LinkedIn.
- Prepare media plans and budgets before launch and update them as required.
- Identify opportunities to scale successful campaigns and channels while maintaining fundraising efficiency.

2. Media Buying & Campaign Management

- Set up, activate and manage paid media campaigns across agreed platforms.
- Manage media buying, budgets, bids, pacing and campaign delivery.
- Develop audience targeting and segmentation, including prospecting, retargeting and lookalike/similar audiences.
- Run structured testing across audiences, creative, messaging, formats and placements.
- Monitor performance continuously and optimize, restructure or scale campaigns based on results.

3. Creative Production, Adaptation & Optimization

- Develop campaign creative concepts, messaging and copy in line with HI brand and fundraising priorities.
- Produce/adapt static, video, motion, carousel, display and other relevant digital advertising formats.
- Create platform- and placement-specific adaptations and A/B testing variants.
- Monitor creative performance and recommend refreshes or new variants where required.
- Manage revisions, approvals and an organized creative asset library.
- Clearly disclose any production limitations and third-party production costs before commitment.

4. Audience & Remarketing

- Develop and manage prospecting audiences.
- Develop website and engagement audiences.
- Use donor/supporter audiences where permitted and appropriate.
- Build and manage lookalike/similar audiences.
- Manage retargeting and suppression audiences to improve relevance and reduce inefficient spend.
- All audience activity will remain subject to applicable privacy, data-protection and platform requirements.

5. Measurement, Reporting & Optimization

- Review and support tracking and measurement setup and validate donation/conversion tracking.
- Identify measurement gaps and recommend practical improvements.
- Provide monthly reporting covering spend, reach, impressions, clicks, engagement, donations, conversions/revenue, CPD/CPA and ROAS.
- Report channel- and campaign-level performance and incremental donation performance where feasible.
- Provide clear insights, actions and recommendations, with ongoing optimization throughout the engagement.

6. Key Deliverables

- Paid Media Strategy – at commencement.
- Media Plan & Budget Allocation – before launch / as required.
- Campaign Setup & Activation – as required.
- Audience & Remarketing Strategy – ongoing.
- Creative Production & Adaptation – ongoing / as required.
- Campaign Optimization – ongoing.
- Performance Reporting – monthly.
- Strategic Recommendations – ongoing.
- Final Performance Review – at the end of the engagement.

7. Brand's Responsibilities

- Provide brand and communication guidelines.
- Provide marketing/fundraising priorities and campaign calendar.
- Provide available creative/content and relevant briefs.
- Provide access to advertising and analytics accounts.

- Provide relevant audience signals where permitted and appropriate.
- Nominate a designated point of contact and provide timely briefs, feedback and approvals.
- Where relevant, provide in-person experience from active projects in India.

8. KPI & Performance Framework

Primary KPI: ROAS based on incremental donations, with an aspirational ROAS target of 3–4x.

Supporting KPIs may include:

- Donations and revenue
- Cost per donation / cost per acquisition
- Conversion rate
- CTR and engagement
- Reach and impressions
- Channel- and campaign-level ROAS
- Incremental donation performance where feasible

Final KPI definitions, targets and measurement methodology will be agreed during onboarding.

Data Access, Security, and Compliance

The agency will require access to relevant advertising, analytics, audience, and campaign platforms to plan, execute, measure, and optimise the engagement. Agencies are expected to:

- Take clear ownership of the diagnosis, media strategy, campaign recommendations, optimisation approach, and performance analysis, with implementation-ready recommendations and briefs wherever applicable.
- Clearly identify in the proposal the activities that will be executed directly by the agency and those that will require coordination, inputs, approvals, or execution by HI and/or its appointed technology partners.
- Work with HI to validate relevant tracking, conversion events, audience signals, and measurement configurations required for campaign performance and reporting.
- Maintain appropriate confidentiality, privacy, advertising-platform compliance, and data-security practices while accessing or processing HI information, audience data, campaign data, and related assets.
- Ensure that all campaign data, audience assets, creative deliverables, reports, and other engagement-related outputs created specifically for HI remain accessible to HI, subject to applicable platform terms and the final contractual agreement.
- Maintain full and appropriate administrative access for HI to its advertising and analytics accounts. The agency shall not create unnecessary vendor or platform dependency or restrict HI's access to campaign accounts or assets.
- Disclose any material third-party tools, technologies, production costs, or platform-related dependencies required for the proposed approach, including any associated costs or limitations.

Dashboards, Metrics, and Review Cadence

To ensure transparent performance management and effective optimisation, the agency is expected to:

- Establish and maintain a standard monthly performance reporting framework covering, as applicable, media spend, reach, impressions, clicks, engagement, donations/conversions, revenue, CPA/CPD, ROAS, and channel/campaign-level performance.

- Clearly document the attribution and measurement methodology used for reporting, including the basis for calculating donations, revenue, CPA/CPD, and ROAS.
- Provide analysis of incremental donation performance where feasible, recognising that incremental impact will depend on available data, tracking capabilities, and the agreed measurement methodology.
- Provide actionable insights and recommendations in each reporting cycle, including key performance drivers, areas of underperformance, optimisation actions, audience learnings, creative learnings, and opportunities for scaling.
- Participate in regular performance discussions with HI to review campaign performance, optimisation priorities, testing results, and recommended changes to media strategy or budgets.
- The frequency and format of working reviews and performance discussions will be mutually agreed during onboarding based on campaign requirements. The agency should recommend an appropriate review cadence in its proposal.

Checkpoints, Budget Prudence, and Transition Support

HelpAge India operates within non-profit budget constraints and expects the agency to balance growth ambitions with fundraising efficiency and prudent media investment. Agencies should therefore:

- Structure the engagement around measurable performance outcomes, with the primary KPI being ROAS based on incremental donations, with an aspirational target of 3–4x, subject to final KPI definitions, targets, and measurement methodology being mutually agreed during onboarding.
- Recommend appropriate allocation and optimisation of media budgets across Google Ads, Meta, and LinkedIn, based on audience relevance, campaign objectives, performance, and available budgets.
- Provide recommendations for scaling, reallocating, or reducing media investment based on campaign performance and emerging learnings.
- Participate in a 90-day performance checkpoint, where HI and the agency may jointly review early results, operational fit, constraints, audience and channel learnings, and agree on appropriate course corrections to the media mix, campaign approach, or targets.
- Recognise that campaign scope, media allocation, creative requirements, and priorities may be adjusted during the engagement based on performance, learnings, external conditions, and HI's fundraising priorities.
- Provide a clear transition and handover process at the end of the engagement, including relevant campaign documentation, performance learnings, account/access information, creative and audience assets, and other materials reasonably required for continuity of operations.
- Ensure that the proposed core team remains appropriately resourced throughout the engagement. The proposal should clearly identify key team members, their roles, relevant experience, and expected involvement. Any material changes to key personnel should be communicated to HI in advance.
- Where creative production or adaptation is part of the agency's scope, clearly identify any production limitations, third-party dependencies, or additional costs upfront and obtain HI's approval where required.
- Any commissions, incentives, rebates, or other financial relationships with media platforms, publishers, or third-party vendors that could materially affect the agency's recommendations must be transparently disclosed to HI.

HelpAge India values long-term partnerships and expects the selected agency to operate with transparency, accountability, continuity, and a strong focus on measurable fundraising outcomes.

Content Safeguards & Approvals

- Ensure all creatives and copy adhere to HelpAge India's dignity-first, non-exploitative communication approach (no shock/pity-led narratives).
- Route sensitive content (claims, impact numbers, beneficiary stories and visuals) through defined internal approvals before use.
- Apply robust placement controls on CTV, affiliates, Reddit and similar channels, including appropriate exclusions, whitelists and blacklists.

What is HelpAge's value proposition against competitors? - Our cause i.e. supports for the disadvantaged elderly. A niche in itself in the non-profit sector and being the oldest in the sector. We have a reach across India and community approach is our focus keeping the elderly at the center.

Content Topic/Exceptions: Anything beyond the elder support cause. Exception can be made to cover inter-generational and environment-friendly/climate initiatives which the organization marries with the elder cause.

Selection Criteria

The selection of the Agency will be conducted through a multi-stage evaluation process as outlined below. Each stage has defined submission requirements and deadlines. Agencies are advised to review all criteria carefully and ensure compliance with submission timelines.

Stage 1: Initial Application

Agencies expressing interest must submit a comprehensive application that includes the following:

1. Agency Credentials Deck detailing:
    - Organizational overview and profile
    - Relevant case studies and work samples
    - Demonstrated experience with nonprofit organizations
    - Industry benchmarks and performance indicators
2. Evidence of organizational capability to deliver against the Scope of Work.
3. Any additional documentation that substantiates fit for the engagement.

Preference will be given to agencies with prior experience in nonprofit sector engagements and demonstrated success in similar assignments.

Applications that do not meet the above requirements or are submitted after the deadline will not be considered.

Stage 2: First Pitch Session

Shortlisted agencies will be invited to present a pitch session either virtually. The pitch must:

1. Align directly with the RFP's Scope of Work and deliverables.
2. Reflect key insights based on the findings from our platforms and preliminary data.
3. Provide non-profit and wider industry benchmarks for performance mapping.
4. Include a clear plan of action with defined measurable outcomes.

5. Demonstrate innovative strategic approaches for digital brand growth, including but not limited to:
    - Donor acquisition funnels
    - Multi-channel engagement strategies
    - Digital performance frameworks

Agencies must ensure that presentations are concise, data-driven, and tailored to our strategic goals.

Stage 3: Financials Submission

Agencies that successfully complete the pitch stage will be required to submit a detailed and itemized financial proposal. The financial submission must:

1. Cover all deliverables listed in the Scope of Work.
2. Provide a clear cost breakdown by service, deliverable, and timeline.
3. Include any assumptions, payment milestones, and terms of engagement.

Financial proposals should be aligned with industry best practices and demonstrate value while ensuring transparency.

Stage 4: Final Outcome

The selected agency will be formally notified via email communication. The final decision will be based on an aggregated assessment of:

- Demonstrated capability and relevant experience
- Quality and strategic alignment of the pitch
- Financial competitiveness and value offer
- Organizational fit with HelpAge India's mission and working ethos

Note: We would be happy to fill questionnaire, only after signing a full Non-Disclosure Agreement, via **email to procurement.query@helpageindia.org deadline 30th September 2026**

I. Terms and conditions

1. The agency can be an individual/HUF/Partnership firm/Company incorporated under the laws of India.
2. This RFP is not an offer by HelpAge India, but an invitation to receive responses from the eligible bidders dealing in **Digital Marketing.**
3. No agency shall be entitled to submit more than one bid whether jointly or severally. If one does so, all bids wherein the agency has participated shall stand disqualified.
4. The agency shall bear all costs associated with the preparation and submission of bid.
5. The agency must have PAN (Permanent Account Number) and registered with GST and the document for the same is to be attached.
6. HelpAge India reserves the right to accept /reject/ select one or more than one agency and to annul the bidding process any or all bids at any time prior to award of contract without thereby incurring any liability to the affected agency.
7. The supplier should have all valid licenses, approvals, certificates, registration from all statutory authorities like Income Tax/GST/any other relevant and mandatory requirements.
8. Notification will be provided by HelpAge India while issuing Purchase Order/ email intimation to the selected bidder at each stage. In case of delay in supply, penalty will be levied.
9. HelpAge India reserves the right to cancel the bid/ contract based on performance without assigning any reason thereof.
10. Evaluation of the bids will be done by Purchase Committee from HelpAge India.
11. HelpAge India management reserves the right to change (increase or reduce) the numbers/units as per its sole discretion and Project requirement.
12. Documents required to release the payment:
    a. Bill / Invoice mentioning Permanent Account Number of Income Tax Department
    b. Documentary proof of the delivery/ service including E-Way Bill, wherever applicable, as per Purchase order
13. Agencies that will be technically qualified would only be considered for opening of financial bids.
14. The bidder is expected to examine all instructions, forms, terms and specification in this RFP. Failure to furnish all information required under this RFP or to submit a bid not substantially responsive to this RFP in all respect will be at bidder's risk and shall result in rejection of the bid.
15. The bidder and their respective officers, employees, agents shall observe the highest standards of ethics dividing the bidding process. HelpAge India has adopted a zero-tolerance policy on gifts and hospitality. Suppliers are therefore requested not to send gifts or offer hospitality to HelpAge India personnel. Notwithstanding anything to the contrary contained herein, HelpAge India shall reject bid without being liable in any manner whatsoever to the bidder if it determines that the bidder has directly or indirectly or through an agent, engaged in corrupts/fraud tent/coercive/undesirable or restrictive practice in the bidding process.
16. Indemnity: The bidder shall indemnity HelpAge India against all actions, suits, claims and demands brought or made against HelpAge India in respect of anything done or committed to be done by the bidder in execution of or in connection with the work of this contract and against any loss or damage to HelpAge India in consequences to any action or suit being against the selected vendor for anything done or committed to be done in the execution of this contract.
17. The RFP shall be evaluated strictly based on the substantive information/credentials/documentary evidences submitted by the agencies.
18. The bidder is expected to examine all instruction, forms, terms and specification
19. HelpAge India Management reserves the Right to award the work to more than one Agency as per requirement.
20. All the bid needs to be submitted via **email to procurement@helpageindia.org** by **30th September 2026 at 23.59 hours IST**
21. Agencies would not be allowed to subcontract partial/full of the work assigned to them. In such case the Management reserves the right to cancel the bid/contract with the agency.
22. The rates quoted by the agency will be inclusive of all Taxes/Levies/Packing and Freight Charges/ platform fees/media spends/content-creative production/personnel/tools/software licenses, etc. Agency should submit the financial bid as per the Annexure-3: Financial Bid Format.
23. Agency shall bear the Insurance if any taken.
24. The rate quoted by the agency will be valid for one season from the award of the contract
25. Items not meeting the specified requirements has to be returned.

Annexure- 1 Technical Bid Format

(To be filled, sign & stamp by Agency)

A

S.No	Particulars	Remarks	Work Experience
1	Experience with HelpAge India/Govt. Agency/NGO/DevelopmentSector	Yes/No	
2	Experience in similar Type of Product/Service supply	Year	

B

S.No	Particulars	Last 3 Year		
3	Annual Turnover as per Audited Financials (Copies of the Audited Financials needs to be attached or Turnover Certificate from Chartered Accountant)	FY 2023-2024	FY 2024-2025	FY 2025-2026

C

S.No	Particulars	Top 5 Client List with value (Rs)	
4	Clientele List		

D

S. No.	Particulars	Details (GST & PAN No.)
5	**PAN**	
6	**GST**	

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C-14, Qutab Institutional Area, New Delhi-110062

Annexure- 2: Technical Bid Format

Location -: PAN India basis

	SPECIFICATION (TECHNICAL)	**AGENCY'S REPONSE (in brief)**
1.	Supply to be done according to the quantities, specifications, quality, schedule and locations approved by HelpAge India	
2.	The acknowledgement for delivery/services of supply to be submitted as proof along with invoice.	
3.	The agency is capable (as defined in RFP document) and agrees to complete the supply within specified time as agreed upon otherwise penalty clause will be invoked.	
4.	Past experience of the agency in supply of items or similar items, as listed in this RFP. Please give details or provide list of clients to whom similar goods have been supplied.	
5.	Management reserves the right to empanel one or more agency (on the basis of quality consideration/experience of the agency) in addition to rates parameters.	
6.	Constitution of the agency whether Proprietorship/Partnership/Company. Give details of Proprietor/ Partner/Directors.	
7.	For how many years the agency is engaged in similar line of activities.	
8.	Registration certificate with GST needs to be submitted along with the technical quotation.	
9.	Penalty clauses will apply as per the company's policy/as per terms of the purchase order: the decision of the HelpAge India shall be final and binding in this regard.	
10	The final price will remain valid for one year from the award of the Purchase order/ contract	

Please Note: -

1. **Form must be completed in all respects; incomplete forms may liable to be rejected.**
2. **The form must be duly stamped & signed by the Authorized signatory**
3. **The form must be submitted on or before due date and time.**

HELPAGE INDIA

C-14, Qutab Institutional Area, New Delhi-110062

Annexure-3: Financial Bid Format

We are submitting the quotation for the above after understanding completely the technical specifications and other terms and conditions of the RFP.

	SPECIFICATIONS	**AGENCY'S REPONSE (Agree/Disagree)**
1.	Rates will be inclusive of all Taxes/Levies/Packing and Freight Charges/ platform fees/media spends/content/creative production/personnel/tools/software licenses, etc.	
2.	TDS as applicable will deduced as per Income Tax Act, 1961	
3.	Payment will be made through cheque / NEFT/ RTGS.	
4.	Duly Certified bills along with signed delivery challan will be submitted for completed tasks on monthly basis.	
5.	Payment shall be made within 60 days after submission of original invoice & proof of delivery of goods at our Head Office at Delhi.	
6.	Penalty clauses will apply as defined in the RFP: the decision of the HelpAge India/Project Management shall be final and binding in this regard	

Kindly Note: Financial bids will be invited from the partners who qualify the Technical Requirements, hence please only send technical bids at initial stages unless otherwise communicated.

To,

Purchase Committee
HelpAge India
C-14, Qutab Institutional Area,
New Delhi 110016

We are submitting below quotation for the above after understanding completely the technical specifications and other terms and conditions relating to time frame, quality as spelled out in the Bid document.

Important Notes:

- Services to be delivered according to the Scope of Work (SEO, Performance Marketing, LinkedIn, New-Gen Channels), specifications, quality, timelines, and measurable outcomes approved by HelpAge India.
- The rates quoted shall be valid for one year from issue of contract/Purchase Order.
- Cost of services should include all kinds of taxes, platform fees, media spends, content/creative production, personnel, tools/software licenses, and other charges.

Scope-wise Financial Requirement

S.No.	Service Area	Key Deliverables (as per SOW)	Proposed Cost (Rs.)	Duration of Contract
1	Digital Media Strategy & Planning	Development of paid media strategy and channel approach across **Google Ads, Meta and LinkedIn**; media planning and budget allocation aligned to awareness, donor acquisition and remarketing objectives; audience strategy; campaign objectives, KPIs and measurement approach.		6 months
2	Media Buying, Campaign Management & Optimisation	Campaign setup and management across Google Ads, Meta and LinkedIn; media buying; audience segmentation; prospecting, retargeting and lookalike/similar audiences; bid and budget optimisation; A/B testing; ongoing campaign monitoring, optimisation and scaling based on performance.		6 months
3	Creative Production, Adaptation & Optimisation	Development and/or adaptation of campaign creatives including **static, video, motion, carousel, display and ad copy** as required; creative testing and A/B testing; performance-led creative optimisation; maintenance of relevant creative assets. Any third-party production costs or limitations to be disclosed upfront.		6 months
4	Audience Development & Remarketing	Identification and activation of relevant prospecting audiences; website and engagement audiences; donor/supporter audiences where permitted; lookalike/similar audiences; retargeting and suppression audiences; ongoing audience refinement based on campaign performance and learnings.		6 months

5	Measurement, Reporting & Performance Analytics	Tracking and measurement validation; monthly performance dashboards covering **spend, reach, impressions, clicks, engagement, donations, conversions/revenue, CPA/CPD and ROAS**; channel and campaign-level performance analysis; incremental donation performance where feasible; actionable insights and recommendations.		6 months
6	Strategic Optimisation & Performance Review	Ongoing strategic recommendations based on campaign and audience performance; optimisation of media mix, budgets, audiences and creatives; identification of scaling opportunities; **90-day performance checkpoint** and final performance review at the end of the engagement.		6 months

Annexure-4

To be submitted by bidder/Vendor /Tenderer

(On Rs.10 stamp paper)

This has reference to the RFP dated …… …. In response to the RFP, we have submitted our technical & financial bids on……at your email address …… In connection with the above bids, we hereby declare as under: -

i- That we are neither related to any of your Board Members, Officers and other employees nor do we have any financial, commercial or other interests with any of the above persons in any capacity whatsoever.

ii- That we have submitted the bids in the name of M/S…… and declare that no other bids have been submitted by us in the name of any other firms/companies/proprietors/individuals which comes under the same management and related parties.

iii- We undertake that:

a. All information furnish by us in respect of fulfilment of eligibility criteria and qualification information of the Bid is complete, correct and true.
b. All copy of documents, credentials and documents submitted along with this Bid and genuine, authentic, true and valid.

iv- We undertake that

a. We are not involved in any litigation that may have an impact of affecting or compromising the delivery of services as required under this assignment.
b. We are not blacklisted by any Central/ State Government/ agency of Central/ State Government of India/Public Sector Undertaking/ any Regulatory Authorities/ Multilateral Funding agency in India for any kind of fraudulent activities.
c. No Criminal proceeding are pending against the Proprietor / Partner /Director of the firm/ company (Agency) and also against the firm/ company.
(Indicate any convictions if any against the above persons or Agency.)
d. The firm/company has not been declared insolvent, bankrupt, not in receivership, or being wound up, not have its affairs administered by a court or a judicial officer

v. We hereby undertakes that If any information and document submitted is found to be false/incorrect or we violate any declaration at any stage of contract, HelpAge India has right to cancel my/our Bid and action as deemed fit may be taken against me/us, including termination of the contract, forfeiture of all dues and banning of our firm etc.

We understand that HelpAge India is not bound to accept any bid received against RFP and HelpAge India has right to reject all or any bid without assigning any reason or giving any explanation whatsoever.