

**Face to Face Services
ActionAid UK
Request for Proposal/Quote**

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1 Copyright Information

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2 Document History

Version	Date	History	Name
1	12/03/2020		Dawn Mackie
2	20/07/2020		Kath Blaize-Smith

3 Glossary

AA	ActionAid
AAUK	ActionAid UK
TM	Telemarketing
CS	Child Sponsorship
RG	Regular Giving
F2F	Face to Face

PS	Private Site
D2D	Door to Door
GDPR	General Data Protection Regulation
ICO	Information Commissioner's Office

4 Organization Information

ActionAid works for a world where the most vulnerable and forgotten can become valued and powerful.

Our top priority is to end the inequality that keeps women and girls locked in poverty, and to restore the rights denied them from birth.

We want to see women and girls out of danger, out of poverty and on track to create the future they want.

We work across Africa, Asia and Latin America, every day, all year round.

We listen to, learn from and work in partnership with 15 million of the world's poorest and excluded people.

More information on the organisation will be made available upon request or can be accessed through our website www.actionaid.org

5 Current Situation Overview

AAUK is part of the ActionAid Federation, and as such plays a key role in global fundraising. AAUK is dependent on systems and technology to deliver the key strategic objectives and the out-sourcing partner will play a key role in supporting our ambitions laid out in our [strategy](#).

The Acquisition team at AAUK recruit new supporters ([links](#)) and raise unrestricted income through a diversified range of channels inclusive of; DRTV, face-to-face, door drops, social media, paid search and display. The main aim of the Acquisition team is to recruit new committed givers who donate a regular (usually monthly) gift via direct debit, and who continue to give over the long-term to support AAUK's work into the future.

The default/suggested RG monthly gift online is £7. Minimum monthly gift for CS is £19.50. More detail can be found on the [AAUK website](#).

AAUK have been running F2F activity for a number of years with varying success. Current campaigns aim to recruit CS links with a RG drop ask, however we will likely look at running RG or CS only campaigns in the coming months.

Currently, F2F focus is on Street activity and we are looking to test and refine PS, D2D, and Experiential fundraising activity in the future.

F2F campaign value varies year on year. 2021 projected expenditure averages approx. £350k. However, due to Covid, which obviously had a substantial impact on F2F fundraising and the ability to test new channels, investment in F2F channels is highly likely to increase in the future pending testing availability and subsequent results.

In order to support this additional investment, AAUK are looking for agencies with substantial F2F experience to support expansion of this channel.

6 Project Purpose

This request for proposal (RFP) is established on behalf of AAUK to pitch for the opportunity to quote for and deliver available F2F campaigns.

Process

Submissions will be reviewed on or around the 1st of each month.

Once your submission has been accepted by AAUK you will be offered the chance to pitch and quote for the next available (or your preferred) AAUK F2F campaign. Please identify channels you offer and availability where possible.

If AAUK decide to proceed, we would agree an initial pilot campaign. If this pilot is completed to a satisfactory standard and both parties are happy, you will then be added to our approved supplier list and will be invited to quote for all AAUK F2F campaigns conducted from Jan 2022 – Jan 2025 (subject to review for extension).

F2F program objectives

- Recruit new committed financial supporters for AAUK via CS or RG offers
- Develop strong, positive relationships between AAUK and its supporters through F2F conversations and recruitment
- Consistently monitor and report on campaign performance
- Optimise individual F2F campaigns as appropriate to improve campaign performance

7 Requirements Detail

In order to successfully manage AAUK's F2F campaigns, it is expected that any prospective agency will be able to demonstrate the standards and expertise detailed below;

- F2F campaign management experience inclusive of at least one of the following; Street, Private Site, Door-to-Door and experiential F2F fundraising
- Appropriate account management experience and expertise
- A paid employment structure for fundraisers (we do not work with agencies operating commission-only payment structures)
- Relevant legislative and data protection knowledge (i.e. GDPR)
- Relevant compliance knowledge and expertise (i.e. Fundraising Regulator Code of Practice)
- Agent training & briefing capabilities to ensure relevant knowledge of the charity, pitch guidance, compliance, regulation etc.
- Detailed reporting and analysis of campaign performance
- Accurate and secure data transfer and storage as appropriate
- Employee recruitment/payment structure in line with AAUK's values and policies

8 Vendor Instructions

In addition to submission of your complete New Supplier Questionnaire, please provide a proposal that outlines your relevant experience and expertise in specific F2F campaigns including:

- Current and previous campaign experience across all applicable F2F channels and areas of strength for both your organisation and the relevant account team
- Applicable charity experience and references for this, including international charity experience if relevant.
- Agency campaign results for comparable F2F activity (including standard KPI's such as CPA's, attrition rates, contact preferences, GA% etc.)
- Relevant mystery shopping results where applicable and if available
- Up to date legislative, regulatory, and compliance knowledge (including GDPR, FR guidance, ICO guidance etc.)
- Detail of training provided to fundraisers as standard and training session access/monitoring provided to charity
- Scope of charity/campaign training as appropriate
- Detail of agency confirmation calling if applicable including all monitoring standards, recording, and client access to calls
- Current complaint rate targets and detail on your complaints process
- Attrition rate targets and any relevant clawbacks issued by collection month
- Standard data file transfer method & frequency
- Personal data security standards and processes to protect data at the point of receipt, storage, and during transfer
- Standard campaign reporting frequency and format
- Capacity over the coming 12 months (and up to 3 years if possible)
- Minimum budget for test campaign

In addition to the above, please provide as part of your submission your current price cards for F2F activity as well as any additional campaign fees included as standard.

8.1 Schedule for Evaluation Process

The expected timeline for the evaluation and decision-making process is as follows:

Process steps	Date
RFP & Tender documents available	August 2021
Opportunity for vendor meetings with ActionAid UK staff	As requested by vendors (pending AAUK availability).
RFP responses	Submissions will be reviewed monthly on the 1 st of each month. If the RFP meets the requirements, you will be contacted by a member of the team for further discussion about your proposal.
Vendor pitch	As required – these will be cyclical throughout the year.
Approval of vendor for campaign testing/pilot	Following pitch meeting with panel.
Standard pilot contract negotiated and signed	Prior to commencement of pilot campaign.
Pilot campaign begins	As per test campaign availability and interest from vendor.
Vendor may be invited to join our Approved Supplier List. You will be asked to complete a master contract	Following satisfactory completion and EOC review of pilot project.
Individual campaign quote provided	As per requests from AAUK and/or interest from vendor.
Campaign sub-contract negotiated and signed	Following appointment of vendor for campaign delivery.

8.2 Proposal Submission & Contact Information

Please submit electronic copy of your proposal, including all supporting documentation to:

Name	Contracts and Procurement Manager (TBC) and UK.IGprocurement@actionaid.org
Company	ActionAid
Address	33-39 Bowling Green Lane, London, EC1R OBJ
Phone	02013 122 0561
E-mails	commercial.uk@actionaid.org UK.IGprocurement@actionaid.org

Contact Person(s) for any questions about the RFP by email only.
UK.IGprocurement@actionaid.org

8.3 Proposal Format

A vendor's internal template for responses to RFP will be accepted. The New Supplier Questionnaire provided herewith must be answered and attached along with the proposal.

8.4 Notifications

Vendors will be notified regarding requests for additional information, formal presentations, and the outcome of the selection process through email.

9 Basis of Award

All proposals become the property of ActionAid UK and will be evaluated by the RFP Review Team.

Evaluation and selection of vendors to provide products and services as defined in this RFP to ActionAid UK will be based on the following criteria, which are given in no specific order.

- Company history and stability
- Robustness of project systems and processes in place
- Depth of overall experience
- Quality assurance offered
- References provided

- Expertise of proposed team

Weighting to scoring will be determined along these areas:

Quality assurance	Price	Systems & Processes	Company experience & Stability	Expertise of team	References
15%	20%	20%	20%	15%	10%

The RFP Review Team reserves the right to accept or reject any or all RFPs received.

The RFP review team is comprised of;

Contracts and Procurement Manager – Jo Armah-Kinson
Acquisition Campaigns Specialist – Vicky Hayles
Senior Acquisition Campaigns Specialist – Kat Moser
Head of Acquisition – Kath Blaize-Smith

The RFP Review Team reserves the right to negotiate with respondents to this RFP, within the requirements of the RFP, to best serve the interests of ActionAid UK. However, vendors **must not assume** an opportunity to negotiate and are cautioned to submit their proposals on a best and final basis since an award or decision is likely to be made without further negotiation based on price cards provided and terms of the original submittals. Accordingly, all requirements must be included with your initial offer.

All proposals submitted will be considered to be proprietary by ActionAid UK and will not be released to any outside party, in part or in total unless required by law. Neither the transmission of this RFP to a prospective bidder nor the acceptance of a reply shall imply any obligation or commitment on the part of ActionAid UK.

If vendor needs to take exception to anything under the RFP, these exceptions must be clearly identified on the RFP response.

All prices and conditions must be shown.