

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

ActionAid UK  
33-39 Bowling Green Lane,  
London EC1R OBJ

[www.actionaid.org.uk](http://www.actionaid.org.uk)

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### 1 Copyright Information

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### 2 Document History

Version	Date	History	Name
1	23/04/2024		Caroline Flynn

### 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 Organisation Information

ActionAid is an international charity that works with women and girls living in poverty. Our dedicated local staff are changing the world with women and girls.

We are ending violence and fighting poverty so that all women, everywhere, can create the future they want.

### Our vision

A just, equitable and sustainable world in which every person enjoys the right to a life of dignity, freedom from poverty and all forms of oppression.

### Our mission

To achieve social justice, gender equality, and poverty eradication by working with people living in poverty and exclusion, their communities, people's organisations, activists, social movements and supporters.

### Our approach

Our human rights-based approach aims to ensure that people are drivers of their own change and able to claim the rights they are entitled to. We focus on women and girls because the denial of their rights is a grave injustice and one of the underlying causes of poverty worldwide.

By working directly with communities, women's movements, groups and networks, social movements and other allies, we aim to tackle the structural causes and consequences of poverty and injustice.

As part of the commitment to women's and girls' rights, we recognise, embody and champion feminist principles not only in our work or what we do but also in the way we work or how we do things. This includes how we work with our staff, supporters, partners, donors, suppliers and everyone else we come in contact with through our work and in our workplaces.

We are embracing intersectional feminist principles in the workplace not only because they are consistent with what we do, but also because we know that they are vital to the success of our mission.

More information on the organisation will be made available upon request or can be accessed through our website [www.actionaid.org.uk](http://www.actionaid.org.uk)

## 5 Current Situation Overview

AAUK is part of the ActionAid Federation, and as such plays a key role in global fundraising. The Acquisition team at AAUK recruits new supporters (links) and raises restricted and unrestricted income through a diverse range of channels, including; DRTV, face-to-face, direct mail, out of home, 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 or recurring card, and who continue to give over the long-term to support AAUK's work into the future.

AAUK started out as a child sponsorship (CS) organisation and that remains a key part of our fundraising strategy, given that the average value is typically much higher than our other RG propositions, and long-term ROI therefore also higher. Our strategic focus for F2F is therefore to recruit new CS donors and to split our targets in favour of CS with a drop RG ask.

The default/suggested RG monthly gift is £10. Minimum monthly gift for CS is £19.50. More detail can be found on the [AAUK website](#).

AAUK has been running F2F activity for a number of years with varying success. Current campaigns aim to recruit CS links with an RG drop ask. Currently, our F2F focus is on Street and Private Site activity only.

AAUK are looking for agencies with substantial F2F experience with charities to support the expansion of this channel.

We are proposing to run a pilot campaign with a new agency to recruit 1000 donors in the second half of 2024. The pilot campaign will run from July to the end of the year, and upon successful completion of this campaign the agency will be invited to quote for future larger campaigns.

## 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 **15th May 2024**.

Once your submission has been accepted by AAUK you will be offered the chance to pitch and quote for a pilot test to take place in July to December 2024. Please identify channels you offer and availability where possible.

If your pitch is successful, we would agree on KPIs for the pilot campaign. If the 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-Dec 2025-26 (subject to review for extension).

## F2F programme objectives

- Recruit new committed financial supporters for AAUK via CS or RG with a 60/40 split in favour of CS.
- Develop strong, positive relationships between AAUK and its supporters through F2F conversations and recruitment
- Consistently monitor and offer mitigations on campaign performance
- Optimise individual F2F campaigns as appropriate to improve campaign performance
- Support the development of campaign proposition and materials where opportunities are identified and ensure those are in line with our anti-racism storytelling principles and anti-discrimination values.

## **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 F2F fundraising.
- High standards of account management experience and expertise
- Relevant legislative and data protection knowledge (i.e. GDPR)
- Relevant compliance knowledge and expertise (i.e. Fundraising Regulator Code of Practice)
- Be a member of CIOF and have robust policies and processes in place to ensure compliance with the Fundraising Regulator and Code of Practice.

- Agent training & briefing capabilities to ensure relevant knowledge of the charity, pitch guidance, compliance, regulation etc.
- Processes to ensure continued compliance with code such as Mystery Shopping, compliance reporting and site visits
- 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

## 7 Vendor Instructions

In addition to submission of your completed 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 - provide testimonials and contact references for this, including international development charity experience where possible
- 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 from both internal and external mystery shops
- 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 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 and/or volume for test campaign

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

### 7.1 Schedule for Evaluation Process

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

Process steps	Date
RFP & Tender documents available	<b>24th April 2024</b>
Opportunity for vendor meetings with ActionAid UK staff	As requested by vendors (pending AAUK availability).
RFP responses	Submissions will be reviewed on the <b>week commencing 13<sup>th</sup> May 2024</b> . If the RFP meets the requirements, you will be contacted by a member of the team for further discussion about your proposal.
Vendor pitch	<b>As required – late May to early June 2024.</b>
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	<b>July-December 2024</b> as per test campaign availability and interest from vendor the pilot would be carried out before the end of 2024.
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.
Detailed 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.

**7.2 Proposal Submission & Contact Information**

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

Name	FAO: Jo Armah-Kinson - Contracts and Procurement Manager  CC: Caroline Flynn – Acquisition Campaign Specialist Amy Russell – Senior Acquisition Campaign Manager
Company	ActionAid UK
Address	33-39 Bowling Green Lane London EC1R OBJ
E-mails	<a href="mailto:commercial.uk@actionaid.org">commercial.uk@actionaid.org</a> <a href="mailto:Caroline.Flynn@Actionaid.org">Caroline.Flynn@Actionaid.org</a> <a href="mailto:Amy.Russell@Actionaid.org">Amy.Russell@Actionaid.org</a>

Contact Person(s) for any questions about the RFP by email only.

[commercial.uk@actionaid.org](mailto:commercial.uk@actionaid.org)

[Caroline.Flynn@Actionaid.org](mailto:Caroline.Flynn@Actionaid.org)

[Amy.Russell@Actionaid.org](mailto:Amy.Russell@Actionaid.org)

**7.3 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.

**7.4 Notifications**

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

**8 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 experience and stability
- Price
- Robustness of project systems and processes in place
- Expertise of proposed team
- Quality assurance offered
- References provided

**Weighting** to scoring will be determined along these areas:

Company experience & Stability	Price	Systems & Processes	Expertise of team	Alignment to AAUK Values incl. ED&I/anti-racism, feminism and sustainability	References
20%	20%	20%	20%	10%	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 – Caroline Flynn**

**Senior Acquisition Campaigns Manager – Amy Russell**

**Head of Acquisition – Daniel Bratt**

**Deputy Director of Public Fundraising - Susan Wilders**

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.