

Telemarketing Campaign 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	27/01/2026	V1	Gee Rowe
2			
3			
4			
5			

3 Glossary

AA	ActionAid
AAUK	ActionAid UK
TM	Telemarketing
CS	Child Sponsorship
RG	Regular Giving
DRTV	Direct Response Television

GDPR	General Data Protection Regulation
ICO	Information Commissioner's Office
PECR	Privacy and Electronic Communications Regulations

4 Organization Information

ActionAid UK is part of a global justice federation with a presence in 71 countries worldwide. As a federation, we work together to achieve social change, gender equality and to address the structural causes of poverty and injustice.

Globally, we want to see a system that is fair and just for all, that starts from a foundation of human rights, peace and security, balanced with the rights of the natural world – as there is a profound inter-dependency between people and the planet.

Our staff, partners and supporters in the UK play a crucial role in supporting the inspirational work of women's rights organisations and feminist movements and in strengthening the programmatic and influencing work of ActionAid Federation members in Africa, Asia and Latin America.

One of the priorities in our new [2025-2028 strategy](#) is to frame our identity and our narratives around the need for systems change and solidarity, not charity. Our goals are to build political and popular support for fair and just systems, and champion women's rights organisations and feminist movements as drivers of systems change.

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

Information on our Feminist Principles can be found here [How we practice feminism at work | ActionAid UK](#)

5 Current Situation Overview

ActionAid UK is part of the ActionAid Federation, and as such plays a key role in global fundraising. ActionAid UK 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 2025-2028 [strategy](#).

Various TM campaigns are run by the Retention and Acquisition teams within the Individual Giving department on an annual basis. These activities primarily aim to; process new donors, convert non-financial supporters into donors, and upgrade/reactivate current and lapsed donors. These campaigns include (but are not limited to) the following:

Retention (all outbound)

Rolling - Recovery calling

Rolling - Welcome and stewardship calling
Annual - Reactivation calling
Annual - Upgrade calling
Annual - Conversion calling
Ad-hoc - Gift Aid calling
Ad-hoc - Administrative calls

Acquisition (outbound)

Rolling – Conversion calling, outbound (Washroom ad SMS to RG/RGPSMS)
Annual – Value exchange and lead generation conversion outbound calling (Lead generated predominantly through paid social activities)

Acquisition (inbound)

Rolling – CS/RG processing inbound calls (DRTV ads).

N.B we appreciate not all agencies undertake inbound calls, we will consider submissions from agencies that do both inbound and outbound calling, as well as inbound or outbound only agencies.

TM campaign value varies year on year. For 2026, we have a planned spend of circa £155k across teams.

The Individual Giving department consists of two teams:

The Acquisition team at AAUK recruits new supporters (links) and raises unrestricted income through a diverse range of channels inclusive of; DRTV, face-to-face fundraising, out-of-home ads, social media, paid search and display, some of which entail TM activity. 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 credit card payments, and who continue to give over the long-term to support AAUK's work into the future.

The Retention team at AAUK are responsible for longer term supporter journeys to retain and develop the relationship with our financial supporters to improve their experience and lifetime value with the charity. This is achieved through various activities inclusive of; supporter communications related to their core support i.e. child sponsorship updates and feedback on their impact, bi-annual appeals, a supporter magazine, e-appeals and the aforementioned TM campaigns.

This RFP focuses on our Individual Giving requirements, but the contract may also cover some Legacy campaigns.

6 Project Purpose

This request for proposal (RFP) is to pitch for the opportunity to deliver AAUK telemarketing campaigns from July 2026 - June 2029 (pending review).

Process

Submissions will be reviewed around the week commencing 6th April 2026. Once your submission has been accepted by AAUK you will be added to our approved supplier list and will be offered the chance to quote for the next available AAUK TM campaigns from July 2026 to June 2029 (subject to review for extension). This can include a full list of service campaign types inclusive of all examples above and any additional campaign or calling type offers you wish to submit.

TM program objectives

- Recruit new financial supporters for AAUK via CS, RG and RGPSMS offers
- Retain AAUK's financial supporters and through welcome calling, regular recovery calling and mop-up reactivation calling
- Continue to develop strong, positive relationships between AAUK and its supporters through uplift/upgrade and welcome TM campaign calling
- Consistently monitor and report on campaign performance
- Optimise individual TM campaigns as appropriate to improve campaign performance
- Commitment to upholding the highest standard and quality of calls that adhere to the Code of Fundraising Practice, GDPR and PECR.

7 Requirements Detail

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

- TM campaign management and execution experience
- Appropriate account management experience and expertise
- Relevant and up-to-date legislative and data protection knowledge (i.e. GDPR, PECR) and how it is implemented on campaign by campaign basis
- Relevant compliance knowledge and expertise (i.e. Code of Practice) and how it is implemented on campaign by campaign basis
- Agent training/briefing to ensure relevant knowledge of the charity, call guides, compliance, regulation etc.
- Detailed reporting and analysis of campaign performance
- Accurate and secure data transfer and storage as appropriate
- Values and policies in line with AAUK's values and policies
- A commitment to the highest standard of call quality and processes that ensure this

8 Vendor Instructions

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

- Current and previous campaign experience and areas of strength for both your organisation and the relevant account team
- Your organisational approach to client management
- Campaign management, what this includes and why this might set you apart from your competitors
- Applicable references for the above
- Up-to-date legislative and regulatory knowledge (including GDPR, PECR, Code of Fundraising Practice guidance, ICO guidance etc.)
- Campaign results for comparable TM activity (including standard KPI's; conversion rates/GA %/contact % etc.)
- Detail of training provided to agents as standard
- Scope of charity/campaign training as appropriate
- Call monitoring standards, recording, and client access to calls
- Standard data file transfer method & frequency (please provide templates if applicable)
- Personal data security standards and processes to protect data
- Standard campaign reporting frequency and format
- Capacity over the coming year (and up to 3 years if possible)
- Any policies, and evidence of compliance with said policies, that align with AAUK's policies and values

In addition to the above, please provide as part of your submission your current rate cards for TM 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	March 2026
Opportunity for vendor meetings with ActionAid UK staff	As requested by vendors (pending AAUK availability).
RFP responses	Submissions will be reviewed during week commencing 6 th April 2026. 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 ideally take place w/c 27 th April.
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 commercial.uk@actionaid.org
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	<u>Gee Rowe – Senior Retention Manager</u> gee.rowe@actionaid.org
Company	ActionAid UK
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

gee.rowe@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.

- Cultural fit
- 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
20%	20%	20%	15%	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
Senior Retention Manager – Gee Rowe
Retention Specialist – Polly Henshaw
Senior Acquisition Manager – Peter Fabian

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.