

Telemarketing Campaign Services ActionAid UK

Request for Proposal

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

Tel: 0203 1220561
www.actionaid.org.uk

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1 Copyright Information

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2 Document History

Version	Date	History	Name
1	21/09/2020		Dawn Mackie
2	07/10/2020	KG & TT feedback	Tom Treasure
3	20/10/2020	Updated	Dawn Mackie
4	11/11/2020	Feedback and updated	Peta Walmsley
5	27/11/2020	Final document for sign off	Dawn Mackie

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

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

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 outsourcing partner will play a key role in supporting our ambitions laid out in our [strategy](#).

Various TM campaigns are run by 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:

Acquisition

Ongoing – Conversion calling outbound (Washroom ad SMS to RG/RGPSMS)

Ongoing – CS/RG processing inbound (DRTV ads)

Ad hoc – Valex conversion calling outbound (Facebook ads request to RG/RGPSMS)

Retention (all outbound)

Ongoing - Recovery calling

Monthly - Welcome calling
Bi-annual - Reactivation calling
Annual - Upgrade calling
Annual - Gift Aid calling
Ad-hoc - Administrative calls

TM campaign value varies year on year. 2020 TM contract values combined average approx. £210k.

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 fundraising, door drops, 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, 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.

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](#).

6 Project Purpose

This Request for Proposal (RFP) is established on behalf of ActionAid UK to pitch for the opportunity to quote for and deliver AAUK telemarketing campaigns from January 2021 to December 2023 (subject to review for extension).

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 quote for the next available (or your preferred) AAUK TM campaigns. 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.

Should we proceed, following the success of an initial test campaign of mutual agreement, you will then be added to our approved supplier list and will be offered the chance to quote for all TM campaigns conducted from January 2021 to December 2023 (subject to review for extension).

TM programme objectives

- Recruit new financial supporters for AAUK via CS or RG offers
- Retain AAUK's financial supporters and uplift via retention, mop-up and upgrade calling
- Develop strong, positive relationships between AAUK and its supporters through TM campaign calling
- Consistently monitor and report on campaign performance
- Optimise individual TM campaigns as appropriate to improve campaign performance

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 legislative and data protection knowledge (i.e. GDPR)
- Relevant compliance knowledge and expertise (i.e. Code of Practice)
- Agent training/briefing to ensure relevant knowledge of the charity, call scripts, 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 submitting a completed AAUK Supplier Questionnaire (downloadable on our website), 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
- Applicable references for the above
- Up to date legislative and regulatory knowledge (including GDPR, FR 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)

In addition to the above, please provide as part of your submission your current price 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	January 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 your submission 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 End of Campaign 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	AAUK Contracts and Procurement Manager: commercial.uk@actionaid.org , AAUK Individual Giving procurement: UK.IGprocurement@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

Dawn.mackie@actionaid.org

8.3 Proposal Format

A vendor's internal template for responses to RFP will be accepted. The New Supplier Questionnaire provided on our website 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
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
Head of Retention – Tom Treasure
Head of Acquisition – Emma Frost
Individual Giving Manager – Dawn Mackie

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.