



**Mercy Corps**

**Request for Proposal - Strategy Review Consultation**

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## I. MERCY CORPS OVERVIEW

Mercy Corps is a global team of humanitarians, working together on the front lines of today's biggest crises to create a future of possibility, where everyone can prosper.

Our mission: to alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.

In more than 40 countries around the world, our nearly 6,000 team members work side by side with people living through poverty, disaster, violent conflict and the acute impacts of climate change. We're committed to creating global change through local impact — 85 percent of our team members are from the countries where they work.

We bring a comprehensive approach to every challenge, addressing problems from multiple angles. Thanks to support from our extended global community, we've provided \$4 billion in lifesaving assistance to meet the urgent needs of more than 220 million people over nearly 40 years. In addition to emergency aid, we partner with local governments, forward-thinking corporations, social entrepreneurs and people living in fragile communities to develop bold solutions that make lasting change possible.

### **Through our impact, influence and innovations, in 2020 we:**

- Reached nearly 37 million people in more than 40 countries.
- Raised \$60.5 million for our COVID-19 Resilience Fund and have reached 15.1 million people so far through our response.
- Provided 1.8 million people with emergency cash assistance.
- Our work in the Democratic Republic of the Congo alone reached more than 4.9 million people
- Secured \$490 million in revenue from institutional and private funders in 2019.
- Piloted the use of 3D printing to support children with disabilities in Jordan's Za'atari refugee camp.
- Sponsored the Global Fragility Act, together with a coalition of 70 grassroots organizations, which created the first-ever U.S. government strategy to tackle alarming levels of global violence around the world. The act was signed into law in December 2019 after receiving bipartisan support in Congress.
- Launched FInX with a \$10M contribution from Ripple and Rippleworks with the goal to accelerate global financial inclusion by advancing innovative, responsible distributed ledgers, digital assets, cryptocurrencies and other digital financial solutions that help people join the global economy and lift themselves out of poverty.

See more details about our impact in 2020: <http://www.mercycorps.org>

## II. PROJECT BACKGROUND AND CONTEXT

The time is ripe for an agency-wide strategy review, as we conclude a year of unprecedented global

upheaval. This is a year where there has also been much internal change within Mercy Corps itself - culminating in the arrival of a new CEO. The global environment we operate in is changing fundamentally and rapidly: conventional ways that INGOs operate are being challenged; the racial and social justice movement has illuminated uncomfortable truths about our industry's colonial past; the long-term economic and social consequences of the pandemic have set back recent gains; the impacts of the climate crisis are already affecting everyday lives and livelihoods, especially the world's most vulnerable; and multiple other stress factors will be of high negative impact to the communities we work with. There are multiple opportunities as well as challenges that these and other factors open up and we want to take time to step back and take a big picture look, rather than assuming that our current business model and strategic focus are resilient enough to carry us forward. We want to position ourselves for greater impact.

As a result of the above, Mercy Corps seeks to conduct a strategy review to address the following questions:

- How does *Mercy Corps' internal* understanding of our strengths and weaknesses compare to how others (peers, donors, partners, social entrepreneurs) see us?
- What really differentiates us from other humanitarian and development International Non-Governmental Organizations?
- What changes in the external environment over the next five years may create opportunities or pose threats to Mercy Corps' operations?
- What changes in our funding sources, current and potential, create opportunities or pose threats to Mercy Corps' funding base?
- What do we mean when we talk about impact and success? How do we define and measure them? Is it overly complicated? How can we better utilize success metrics to help drive towards greater impact?
- Given our competitive strengths, aspirations and the changing environment, what changes to our programming focus and internal structures should we consider to maximize our impact? How do we increase the scale of our impact significantly?
- What do we stop doing to allow greater focus?
- How do we build upon the substantive strategic thinking that we have already done while also stretching ourselves to think in radical ways?
- How do we build on our strengths to attract new and innovative partners and funders, outside of the traditional funding sources (institutional donors)?
- How could our business and funding model evolve to allow for growth and build in resilience?

As background, and to help respondents understand Mercy Corps' current programmatic, financial and organizational structure and focus, the following documents will be available upon completion of a Non-Disclosure Agreement (attached).

- Mercy Corps' FY20 and FY21 Strategic Compass provides insight into Mercy Corps Strategic Framework, our perspective on the macro trends that we are responding to, and current priorities.

- Annual Budget Message and Global Financials for FY20 and FY21. Additional financial information will be provided upon request.
- Simplified Organizational Chart with a focus on our senior leadership.
- Select internal strategies, including: Global Program Vision and Regional Strategies, Resource Development Strategy, Gender Diversity Equity and Social Inclusion Strategy, Localization Paper, Ventures Impact Report.

Mercy Corps is seeking a consultant(s) firm to review our existing strategy process and products with a fresh perspective, bring organizational strategy expertise and serve as a provocative partner to lead us towards an evolved iteration of our organization that can positively impact the lives of as many people as possible. We are looking for consultants who are ready to roll up their sleeves, engage in the messy work, and push us to think differently, while retaining the parts that make us the unique and passionate organization we are. We are ready for new insights and thought-provoking analysis, creative processes and robust dialogue to bring us to the next iteration of Mercy Corps for 2021 and beyond.

By the end of this process we envision a new strategy with a ten-year vision and medium-term recommendations that the Mercy Corps team can align behind to drive us to even greater impact.

### III. DESIRED SERVICES & SCOPE OF WORK

#### Objectives

We are seeking a process that encourages radical thinking, challenges the common narrative, and asks uncomfortable questions. This review will lead to challenging conversations about the future direction for Mercy Corps, and result in a framework for decisions and action. We are looking for a firm to partner with us to determine appropriate methods for internal and external outreach and participation, encourage candid review of our current status, gather and analyze external data, make recommendations for potential changes to strategic direction, understand the financial implications of these potential changes, and share insights into future actions.

We envision two phases for this work: 1) situational analysis followed by 2) strategy development. The situational analysis will be participatory, gathering the wisdom of Mercy Corps' dispersed leadership as well as looking externally. The strategy development will be conducted within a smaller circle, and will be informed by shared facts and understanding that emerge from the situational analysis. Along the way, we need clear points for communication and transparency to the global agency.

#### Activities

##### Situational Analysis

- Top line review: industry trends, shifts in the external environment, and creative disruptors that will impact and enhance our mission. This will include a literature review of key internal material including budgets and financial forecasts, strategies and assessments from the last five years and will leverage the expertise and networks of the consultants. It will include a review of peer organizations, as well as innovative newcomers, to identify successful and unsuccessful initiatives and strategies that may inform our review. And it will include interviews with key

fundors to identify trends and goals among our funding sources and potential funding sources. What do these funders like about Mercy Corps programs? What do they wish we could do better?

- Lead thought-provoking focus group discussions and interviews with a mix of internal stakeholders, board members, and existing and potential external stakeholders (donors, partners, those in and outside of the industry).
- Organize and support internal working groups to develop a clear and concise process to engage and inform new conversations, when and if deeper exploration is helpful.
- Partner with the internal strategy team (the internal client team) to ensure engagement of a cross section of team members across the organization to engage a variety of opinions and perspectives. We will be looking for guidance on the best approach to engage diverse audiences in a way that is practical and the best use of time and resources.
- Actively engage key leaders (steering committee, executive team and board) throughout the process to ensure buy-in and that the project is on track.
- Lead on internal communications - ensuring transparent and inclusive communications and identification of proper channels. We will need your help keeping the global team updated and building ownership of the final strategy outcome.

### **Strategy Development**

- Identify and lead key interviews, conversations and workshops needed to pinpoint focus and clarify key strategic decisions that must be made.
- Bring in examples of other leaders, organizations and private companies that will spark creativity, new thinking and new approaches that lead to impactful results.
- Through a process of listening, learning, provoking and teaching - lead us in the exploration of decision points and frameworks that will evolve Mercy Corps into an even stronger organization.
- Partner with the Executive Team and the CEO to develop a new, bold and creative strategy that includes operational and financial considerations to be shared with the board.
- Present critical updates and direction to the CEO, the Executive Team, Regional Directors, and the Board along the way to ensure the project is on track.

### **Deliverables**

#### **Situational Analysis**

- **Analysis of the Evolving Global Landscape and our Industry** - Incorporating input from our internal analysis, what global trends may disrupt, threaten, or provide opportunities for our work? Where are top institutional and private donors (both current and potential) headed strategically? How is the balance between development and philanthropic funding shifting? What major trends are others (both within and outside of our sector) preparing for? How should our sector be changing? What is the future role of INGOs in working in fragile contexts? How do we challenge and pivot away from the colonialist model that our sector has been built on for decades? What are the financial implications of these trends?
- **Reflection on Mercy Corps' Strengths and Weaknesses:** This analysis should consider Mercy Corps' perspective of ourselves as well as external perceptions of Mercy Corps, and where the gaps between the two may be. Internally, this process should elicit examples of our greatest 'pride' and 'disappointments.' What do we regard as our 'signature programs? What do informed outsiders think? This internal analysis should take into consideration our business model (organizational architecture, where teams sit and their functions, fundraising, the

allocation of resources, etc.) External viewpoints of funders, partners, and competitors should be considered and compared with the perceptions we have of ourselves.

- **Competitive Analysis:** Building off an internal analysis of our strengths and weaknesses, look within our sector and beyond. In addition to traditional INGO's, who are our current and future competitors? What are their business models? How have they changed over time? How will they look five years from now? What are our competitive advantages and where are we most threatened?
- **Financial Analysis:** How are we financially positioned to support the organization in this evolving landscape? Where are we vulnerable?
- **Analysis of our Success Metrics:** An assessment of how we currently look at, measure and report on impact. Are our metrics acceptable and clear? What are we doing well? Not doing well? Where do we have the most impact? Where do we have the strongest reputation?

### Strategy Development

- **New, Bold, and Creative Strategy:** Through close collaboration with the Executive Team and Regional Directors, the consultants will take the findings from the Situational Analysis and explore strategic implications and potential directions. This conversation will capture where Mercy Corps is now and how we must adapt/change in order to achieve the vision we establish through this process. What opportunities exist to either expand or refine focus? **By the end of this process we envision a new strategy with a ten-year vision and medium-term recommendations that the Mercy Corps team can align behind to drive us to even greater impact.**
- **Financial Resources:** In collaboration with the Finance team, determine and describe the potential financial considerations and changes needed to support this new strategy. How does this intersect with analysis of the global and industry landscape? What are the implications on our business model and priority funders?
- **Metrics:** Together with the Executive Team and Regional Directors, set big and audacious goals and develop the metrics, or a framework, that will guide us and allow us to track our progress towards those goals.

### Global Team Engagement

- **Internal Communications:** Lead the development of communications to various audiences throughout the Mercy Corps community to ensure transparent communications and, where appropriate, opportunities for input. This will require a multi-channel approach.
- **Change Management:** Advise the Mercy Corps team and support our efforts to manage expectations and lay the groundwork for the new strategy and organizational implications of decisions resulting from our strategic reflections.

### Downloadable File of Project Inputs

- Information from interviews (with names removed where necessary) and findings from research are the intellectual property of Mercy Corps.

(Note: Applicants are encouraged to suggest additional / different deliverables based on their technical approach.)

### Characteristics of the Consulting Firm:

- Strategy experts with thought-provoking analysis capabilities, international expertise, an understanding of the international aid funding model but also expertise with adjacent sectors, and strong external connections/networks.
- Deep facilitation experience and creative processes that allow for robust dialogue, conversations that delve deeper than surface level, allowing for uncomfortable conversations, and driving towards clear decisions.
- Bold thinkers comfortable challenging the status quo and the received wisdom, willing to go out on a limb and provide us with recommendations on how we might adapt.
- Experience in partnership, not just the outside 'expert', working to build ownership with internal stakeholders and leadership.
- Available across multiple time zones, eager to work with a diverse and global group of stakeholders, and able to contribute equally diverse talent and perspective.
- A strong point of view and internal practice towards furthering your own and your clients' commitments towards Diversity, Equity and Inclusion.

## IV. EVALUATION OF PROPOSALS

Proposals received by the due date will first be screened for completeness and conformity with eligibility criteria and proposal requirements. Proposals will be scored using the following criteria. Points for each question will range from 0-20 the maximum technical score is 100 points. Proposals should address each evaluation criteria.

- **Adherence to the RFP Requirements:** In order to secure information in a form, which will ensure that your proposal will be properly evaluated, you are asked to submit your proposal in the format listed below. Standard proposal formats are acceptable provided the following information is included:
  - Name, address, telephone number and email address for principal contact.
  - A brief outline of your organization and services offered, including:
    - i. Full legal name, jurisdiction of organization or incorporation and address of the company
    - ii. Full legal name and country of citizenry of company's President and/or Chief Executive Officer, and all other officers and senior managers of the company
    - iii. Year business was established
  - Detailed description of the proposed process for both phases of the Situational Analysis and Strategy Development.
  - Name and professional qualifications of personnel who would lead the full engagement with Mercy Corps - these personnel must be available for interviews during the selection process.
  - Names, addresses, phone numbers and email addresses of at least two clients of similar industry and scope of operations as Mercy Corps that can be contacted as references. ○ Provide a brief description of the relevant assignments and outcomes.

Did the bidder conform to all requirements and product or service specifications in the RFP? (0-5)



- **Technical Criteria:** Includes the bidder’s understanding of the outputs required, bidders’ project management plan, supplier’s qualifications and bidders’ overall resources. Does the supplier have the right qualifications?
  - A. Are bidders strategy experts with strong analytic capacity who bring a deep understanding of our industry and adjacent sectors? Are bidders well-networked and able to access their connections to deepen the conversation or contribute different perspectives? (0-15)
  - B. Do bidders bring a depth in their facilitation approach? Are they able to surface the wisdom of larger groups and likewise facilitate uncomfortable conversations in smaller settings? Are bidders experienced in building ownership with key stakeholders? (0-15)
  - C. Do bidders demonstrate a track record of co-creation and working in partnership with their clients? Do they have expertise in change management and internal communications? (0-10)
  
- **Management Criteria:** Includes the bidder’s experience on similar projects, bidder’s performance on similar projects, bidder’s available facilities and resources for the project and the bidder’s plan for management and control of the project.
  - A. Bidders should provide: A narrative, no longer than 15 pages, that covers: Overall concept and approach, methodology, types of products and processes used, milestones, and timeline for deliverables. Offerors must demonstrate an appropriate understanding of relevant methodologies and approaches. They must propose the ways in which they will engage different parts of the organization to ensure agency buy-in. (0-20)
  - B. Do bidders demonstrate boldness and creativity in their proposed approach? Did the proposal itself challenge our assumptions or introduce new or different ways of thinking about this exercise? (0-10)
  - C. Do bidders demonstrate a track record of being able to work with diverse and global stakeholders? Have they exhibited a compelling point of view and practice towards furthering commitments towards Diversity, Equity and Inclusion? (0-10)
  
- **Cost Criteria:** Cost will be evaluated using value for money. Provide the cost of the services you describe above, including hourly rates for the relevant staff assigned to work with Mercy Corps. (0-15)

## V. PROPOSAL FORMAT & REQUIREMENTS

In order to secure information in a form, which will ensure that your proposal will be properly evaluated, you are asked to submit your proposal in the format listed below. Standard proposal formats are acceptable provided the following information is included:

1. Name, address, telephone number and email address for principal contact.
2. A brief outline of your organization and services offered, including:
  - Full legal name, jurisdiction of organization or incorporation and address of the company
  - Full legal name and country of citizenry of company’s President and/or Chief Executive Officer, and all other officers and senior managers of the company
  - Year business was established
3. Name and professional qualifications of personnel who would provide the services.

4. Names, addresses, phone numbers and email addresses of at least two clients of similar industry and scope of operations as Mercy Corps that can be contacted as references.

#### CONTACT FOR BID INQUIRIES

All inquiries concerning this solicitation shall be addressed to the following Designated Contacts:

- Mark Spencer – Director, Global Procurement – [mspencer@mercy Corps.org](mailto:m Spencer@mercy Corps.org)

Please email an electronic version of your response (via e-mail), including all supporting documentation, and direct questions about the RFP to each of the designated contacts.

All questions should be submitted in writing (via email) citing the particular bid section and paragraph number. Bidders should note that all clarifications and exceptions are to be resolved prior to the submission of a bid.

Only questions received during the Question and Answer period (as outlined in the RFP Calendar) will be addressed. No telephone questions will be answered. Official answers to the questions will be posted on Mercy Corps website at [www.mercy Corps.org/tenders](http://www.mercy Corps.org/tenders)

#### **Timeframe / Schedule**

We are looking for a proposed timeframe that would see the work completed by June 30, 2021 with the possibility of follow-up work outside the scope of this bid. While we are looking for the process to be proposed by the consultants, there are key convening/meetings of Mercy Corps leadership within Mercy Corps' fiscal year that we would expect the consultants to make use of for consultation, presentation and/or engagement.

#### RFP CALENDAR / TIMELINE

- RFP published: January 6, 2021
- Questions & Answers period: January 6-19, 2021
- RFP Responses due: February 4th, 2021 5pm PST
- Vendor meetings (oral presentations & interviews) week of: TBD
- Vendor selected and notified: TBD
- Contract Kick-Off: TBD

#### PROJECT DUE DATES

- March 31: Situational Analysis Report and Presentation
- April 1-15: Presentations of and input on the situational analysis
- April 15: Strategy Development launches
- June 1: Strategy Recommendations and Board Presentations
  - June 17:, European Board Meeting
  - June 24: Global Board Meeting
- June 30: Wrap-up

## **VI. OTHER TERMS & CONDITIONS**

### **WITHDRAWAL OF RFP**

Proposals may be withdrawn before the RFP submittal deadline by submitting a written request to the Contact Person. Re-submittal before the RFP submittal deadline can be made; however, they may not be re-submitted after the deadline.

### **RFP COSTS**

All costs incurred in the preparation and presentation of proposals to the RFP shall be completely absorbed by the responding party to the RFP. All documents submitted as part of the RFP will become property of the Mercy Corps. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.

### **AWARD BASIS**

At the option of the Mercy Corps, finalists for the Agent designation may be selected for a final round of negotiations; however, applicants are encouraged to present their best offers with their initial submission. Mercy Corps reserves the right to accept or reject any and all proposals, to waive any irregularities in any proposal process, and to make an award of contract in any manner in which Mercy Corps, acting in the sole and exclusive exercise of its discretion, deems to be in Mercy Corps best interest.

### **CONTRACTUAL DEVELOPMENT**

Once an applicant is approved as the exclusive Agent, the successful respondent will enter into a contract with the Mercy Corps. Contract discussion and negotiation will follow the award selection. Bidders must be amenable to inclusion, in a contract, of any information provided whether herein or in response to this RFP, or developed subsequently during the selection process.

### **CONTRACT TERMS**

Firms that are selected as the exclusive Agent are eligible to enter into a service contract. Mercy Corps may terminate the contract upon written notice to the Agent of not less than thirty (30) days.

### **EQUAL OPPORTUNITY**

Mercy Corps emphasizes that all respondents will receive full consideration without regard to race, color, religion, sex, national origin, sex, disability, age or sexual orientation. Minority and women-owned firms, and groups with a strong presence outside of the US are especially encouraged to respond to this RFP.

## **LIMITATIONS**

Mercy Corps, reserves the right to reject any and all Proposals and to waive any informality in the solicitation process. Total proposal length excluding cover letter, details of professionals who will provide services, and contact information of client references, should not exceed 15 pages.