



Mercy Corps

Request for Proposal - Donor Personas & Market Research

April 13, 2021

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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 of accelerating 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

Mercy Corps is looking to grow our donor base—now and in the future—and to do so with a limited budget. To be successful, we need a deeper understanding of the audiences with whom we can have the most impact. We're looking for a partner to aid us in achieving that.

Within our sector, support from individuals is increasingly important as the need for humanitarian assistance is on the rise and funding is on the decline. We also know that the need for this support is not short-term. However, Mercy Corps' current donor file—which is whiter and older than the population as a whole—presents a challenge to our long-term file health and growth potential.

In addition to leveraging our current supporter base, we must build relationships with younger and more diverse audiences to ensure we have a robust pipeline of supporters for the future. And with limited dollars to achieve these growth goals, our efforts must be strategic to make the most impact.

Finally, as donors are key stakeholders who shape organizational direction, diversity within the donor base is vital to ensuring that Mercy Corps work is fully inclusive. Like many organizations, Mercy Corps is missing out on vital support by not engaging more diverse groups of donors, particularly as the United States becomes increasingly racially and ethnically diverse.

Mercy Corps is poised to realize efficient growth of its donor file, and we are looking for a partner to accelerate our efforts to expand and diversify our donor base.

The outcome of this project will help us to:

- Identify under-represented philanthropic audiences that have a high propensity of becoming Mercy Corp donors and develop strategies for effectively engaging and communicating with those audiences, thereby expanding Mercy Corps' donor base.
- Identify our brand awareness audience, e.g. what is the profile of the person -- demographically and psychographically -- that we should be targeting for our annual brand awareness campaign in order to provide top-of-funnel support to the MMF's file growth and diversity goals.

The deadline to have the project completed is June 30, 2021.

Additional background information on the Mercy Corps donor file will be provided upon submission of a signed nondisclosure agreement.

III. PROPOSED SERVICES & SAMPLE SCOPE OF WORK

In order to meet the objectives stated above, Mercy Corps is seeking a partner to:

1. Define our donor audience segments, both current and aspirational, with a focus on identifying diverse philanthropic audiences that are under-represented in our current file and those who may be more broadly marginalized within philanthropy. Develop personas that include:
 - Demographic characteristics like age, geographic location, ethnicity, gender, etc.

- Psychographic characteristics and attitudinal insights like motivations, beliefs, challenges, etc.
- Media consumption, affinity brands (commercial and nonprofit), and purchase habits
- 2. Match the donor audience segments against the sales funnel such that it's clear which audiences are top, middle, and bottom
- 3. Provide specific recommendations to guide our donor acquisition and retention strategy including:
 - Identifying markets with high opportunity for engagement and prospecting
 - Sharing insights into what types of content, messages, positioning, channels, and value propositions are most likely to engage and resonate with each audience segment
 - Guiding mix of marketing and acquisition investment for current versus aspirational audiences to ensure file and revenue growth and health

Of note, the solicitation and inclusion of the voices and perspectives of diverse and underrepresented audiences throughout this project is of the utmost importance, and should be prioritized by the agency in the designing and development of the methodologies and strategies laid out in their proposal.

IV. EVALUATION OF PROPOSALS

Please make sure to cover the following items in your proposal. Ideally, you will be able to cover these and any other information you choose to provide in a maximum of **10-15 pages**. There is no minimum number of pages.

A. Agency information

- A.1. Provide a brief history of your agency.
- A.2. Provide a brief list of agency capabilities.
- A.3. What percentage of your business is with non-profits?
- A.4. What is the composition of the working team?
- A.5. Please explain your view and practice towards furthering commitments towards diversity, equity and inclusion, and your track record in this area.

B. Experience

- B.1. Please tell us about your experience in donor audience insights, persona development and market research.
 - B.1.1. Specifically, please detail your experience identifying and developing strategies to engage diverse or under-represented audiences.
- B.2. Please tell us about your use of appended data in creating fundraising strategies including append types and any vendors.
- B. 3. Please detail your non-profit experience, including names of organizations with which you have worked.

C. Work examples

- C.1. Provide 2-3 short examples of successful similar engagements, with a brief summary of scope of work and any learnings you were able to take away. Include links to live work or to a portfolio site if relevant.

D. Approach

- D.1. Describe your onboarding and discovery process for new clients. Please include estimated time needed with MC team members and data sharing.
- D.2. Describe your approach to data analysis and appends.
- D.3. Describe your normal turn-around times, from small to large requests and from low to critical priority.

E. Pricing

- E.1. At a high level, describe how you approach project pricing (hourly, fixed bid, etc).
- E.2. Provide pricing for estimated scope of engagement, including low, medium, and high level engagement. Please break out by items of engagement as you see recommended, e.g. persona development, market penetration, data appends and competitor landscape.
- E.3. Provide pricing for additional hours if we exceed the scope of work

*Note: If you have a different model or models that you would like to propose for this engagement feel free to do so. However, please still include the requested information above in addition.

F. References

- F.1. Please provide names, organization, and contact information for two former or current clients who can speak to your agency's capabilities and execution.

Proposals will be scored using the following technical criteria. Points for each question will range from 0-10. Proposals should address each evaluation criteria.

EVALUATION CRITERIA

Criteria	Weight
Cost: Overall value for cost	10%
Execution & Timeline: Can provide strategic insights and actionable plans by Mercy Corps' requested deadline, while maintaining project integrity.	20%
Nonprofit Marketing & Fundraising Expertise: Demonstrated experience conducting market research and developing strategic recommendations for nonprofit clients	20%
Technical Expertise: Demonstrated expertise in donor audience insights, persona development and market research; experience identifying and developing strategic recommendations for engaging diverse audiences.	25%
Strategic Approach: Clearly outlined strategic approach that fulfills project goals.	25%
Total	100%

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:

- Chris Mericle, Senior Procurement Manager, cmericle@mercycorps.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.mercycorps.org/tenders

RFP CALENDAR/TIMELINE

- | | | |
|--------------------------------|-------|-------------|
| • RFP published | | 4/13 |
| • Questions and Answers period | | 4/13 - 4/19 |
| • RFP responses due | | 4/21 |
| • Vendor meetings week of | | 4/26 |
| • Vendor selected and notified | | 5/3 |

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 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 12 pages.