



MERCY CORPS

Request for Proposal **Mass Market Fundraising Donor Ratings**

Date May 10, 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 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

Mercy Corps' Resource Development department advances the organization's strategic goals and supports our worldwide team by raising flexible funds, profile, and influence. The Mass Market Fundraising team within the Resource Development Department uses digital and offline channels to build relationships and support from donors with average gift sizes between \$1 - \$10,000 per year. The Mass Market Fundraising team is responsible for building the pool of monthly sustainers, planned giving donors and prospects,

advocacy program participants, Mid-Level donors (annual giving between \$1,000 - \$10,000), and the pipeline for Major Gifts donors (annual giving greater than \$10,000).

To ensure that our outreach efforts target the audiences most likely to respond favorably to particular campaigns, we utilize donor ratings, wealth screening, and prospect research tools that help us prioritize donors based on their wealth capacity, willingness to give, affinity to causes like ours, and likelihood to engage in certain methods of giving (monthly, planned gift, etc...)

Mercy Corps' Mass Market Fundraising team is requesting proposals from data analytic service providers that can provide predictive modeling analysis that result in donor ratings/scoring for key donor behaviors, in addition to a wealth screening and prospect research tool, that can enable us to create effective and efficient strategies for communicating with the more than 200,000 donors within the Mercy Corps donor file.

III. Desired Services & Scope of Work

1. The Proposal should provide an overview of your organization's qualifications, experience with similar projects of at least a similar scale, and background in data science and methodology for creating donor ratings.
2. Please discuss your ability to use predictive modeling to generate ratings that meet the following criteria, as well as any additional models or ratings that you feel would be beneficial to us:
 - Donor likelihood to give at the Mid-Level (\$1,000 - \$9,999)
 - Donor likelihood to give at the Major Gift Level (\$10,000 +)
 - Donor likelihood to become a Monthly Sustainer
 - Donor likelihood to become a Planned Giver
 - Donor affinity for similar causes
 - Donor net worth
 - Donor gift range
3. Please describe your wealth screening and prospect research tools or services.
4. Detail any additional customer support services you provide (designated relationship manager, training sessions, etc...).
5. Please discuss your organization's data security measures.
6. Please include a timeline for delivery of services and an estimated cost.

IV. Evaluation of Proposals

Proposals will be scored using the following technical criteria. Points for each question will range from 0- 25 the maximum technical score is 100 points. Proposals should address each evaluation criteria.

- Adherence to the RFP Requirements: Did the bidder conform to all requirements and product or service specifications in the RFP? (0-25)
- Technical Criteria: Includes the bidder's understanding of the service or procurement required, bidders' management plan, qualifications and overall resources. Does the bidder have the ability to deliver donor ratings and wealth-screening tools similar to what is described in the "Scope of Work" section? Does the supplier have the right qualifications (registration, insurance, experience)? (0-25)

- Management Criteria: Includes the bidder's experience on similar projects of at least a similar scale, 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. Does the bidder provide an adequate description of their data security measures? (0-25)
- Cost Criteria: Does the quoted price represent strong value for money relative to comparable-quality service providers in the industry? Has the bidder provided details about the customer support services that are included? (0-25)

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 Contact:

- Mark Spencer – Director, Global Procurement (mspencer@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 May 10th 2021
- Questions and Answers period May 10th to May 18th
- RFP responses due May 21st 5PM PST
- Vendor selected and notified May 2021

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.