



MERCY CORPS

**Request for Quotation- Climate
Fundraising Campaign Consultancy**

RFQ NUMBER –HQ336

Date: 12/2/2022

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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. Mercy Corps' climate response is built on bold action to confront addressable challenges. We help households, communities, governments and ecosystems adapt to a changing climate by building climate-resilient communities and supporting low-carbon development.

Climate change is a significant growth area for fundraising for every revenue-generating team at Mercy Corps. The impact of our changing climate is top of mind for foundations, companies, high-net-worth individuals, financial advisors, individual donors, and leading institutional partners. Mercy Corps seeks an experienced fundraising consultant to guide the exploration and definition of a multi-year fundraising campaign to support the further scale of our climate work. If successful, a climate campaign would deliver transformative financial resources for Mercy Corps' climate adaptation and resilience programming and raise our profile with new donors, media outlets, and influencers to increase our global impact.

Mercy Corps is committed to principles of Diversity, Equity and Inclusion and to supporting underrepresented communities, including BIPOC, diaspora, indigenous, and LGBTQ+. Mercy Corps welcomes and encourages qualified, like-minded individuals and organizations to respond.

I. Project Background and Context

Mercy Corps is seeking a fundraising campaign strategist with a demonstrated track record in setting up an eight-figure global campaign. The consultant will work with the Mercy Corps team to first assess the feasibility of a multi-year fundraising campaign. This assessment phase will build off Mercy Corps' initial donor landscaping scans, prospect research, and the development of a draft campaign focus and narrative (see phase 1 deliverables). Based on the results of the initial assessment, the consultant will then prepare detailed recommendations on implementing and managing a campaign from a strategic and operational standpoint (see phase 2 deliverables).

Mercy Corps' Development team consists of nearly 50 fundraising professionals and support staff who annually bring in over \$100M in revenue. This team works in lockstep with the Marketing and Communications team to communicate fundraising goals and programmatic initiatives to the broader Mercy Corps audience.

In issuing this RFQ, Mercy Corps seeks to

- Further understand the overall philanthropic landscape for climate funders – with a focus on donors supporting international climate adaptation and resilience work.
- Conduct an audit of Mercy Corps' fundraising capacity, specific to climate donors. Identify strengths, weaknesses, and gaps in existing fundraising efforts and infrastructure to determine areas for improvement and development.
- Develop guidance on a climate fundraising campaign, building on work to date. Guidance should include fundraising targets (unrestricted and restricted), a donor prospects list (corporate, foundations, philanthropic advisors, and individuals),

identification of key profile-raising opportunities that align with Mercy Corps' climate strategy vision and recommended operational requirements for success.

- Assess the opportunities and threats external to the organization and organizational readiness that will inform the multi-year fundraising campaign to ensure its success.
- Develop a strategic multi-year fundraising and implementation plan for the campaign, including strategies to increase Mercy Corps' climate fundraising efforts with the private sector, foundations, individuals, philanthropic advisors, and others that are reflective and in alignment with Mercy Corps' climate strategic priorities.

II. Desired Services & Scope of Work

DELIVERABLES

Phase 1) Multi-year fundraising campaign feasibility study and recommendation

- Analysis of donor and “competimate” trends and areas of opportunity for Mercy Corps, including influential events and platforms to raise the profile of Mercy Corps' climate programs and technical expertise.
- Audit of Mercy Corps' climate fundraising capacity – including areas of strength and recommended opportunities for improvement to ensure the campaign's success.
- Analysis of the potential external risks and recommendations for risk mitigation and management.
- Further refinement of top prospects lists for each of the campaign's key audience groups (corporate, foundations, individuals, philanthropic advisors, big bet philanthropy and others).
- Proposed strategic focus and refined value proposition for Mercy Corps' climate work that will resonate with the highest-potential donor audiences.
- Compilation of findings from donor stakeholder interviews to assess:
 - Longer-term trends in the climate philanthropy space
 - External perspective on Mercy Corps' reputation in the climate adaptation and resilience space and resonance of key messaging
 - Donor insights on the potential scale of funding capacity and Mercy Corps' competitiveness for current climate funding opportunities
- Recommendation on the scope, priorities, and fundraising targets for key audiences (corporate, foundations, individuals, philanthropic advisors, big bet philanthropy and others.)

Phase 2) Multi-year fundraising campaign implementation and management plan

- Based on findings from Phase 1, develop a staffing and project management recommendation.
- Based on findings from Phase 1, provide recommendations for the campaign timeline from start to scale, along with a corresponding workplan.

An eventual Phase 3 is likely to focus on the development of a **campaign messaging and communications strategy**, including the following:

- Strategic messaging framework and talking points.
- Pitch deck(s) for key thematic areas or signature programs.
- Two pagers/factsheets for key thematic areas or signature programs.

Please note that this potential future work may be carried out by the same or a different vendor, depending on skillset. Description included for information only - do not include in bid.

III. Evaluation of applications

Proposals will be scored using the following criteria.

1. Adherence to the RFQ Requirements
2. Technical Criteria:
3. Delivery Time/Project Schedule
4. Cost:

IV. Quotation Format & Requirements

Quotation Format:

Standard quotation of 10 pages or less is requested and must include the following information:

1. Your approach to nonprofit fundraising campaigns
2. A summary of your fundraising assessment and campaign planning experience
3. Identify specific nonprofit feasibility assessments and/or campaigns you have supported
4. Two client references
5. Sample project timeline with major tasks and milestones
6. Project budget
7. Identification of those on your team who will be involved with the project, which should include their role and experience

The Quotation should include the following information to be considered:

- **Contact information:** name, address, telephone number, website and email address for the bidding party.
- **Consultant Qualifications & Roles:** The quotation must describe the consultant's qualifications, such as work activities, expertise, knowledge, and experience. Experience should include examples of similar related nonprofit work. Some qualifications that will be considered include
 - Years and type of experience with non-profit private fundraising, campaign feasibility studies, and campaign planning
 - Experience working with climate donors (individual, foundation and/or corporate)
 - Project management experience
 - Example(s) of prior work and other work products demonstrating skills and expertise.
 - Skills of the proposed team member(s)

- **Work Plan:** The quotation should include a description of the activities to be conducted by the consultant to complete the work.
- **Previous Work Product:** Please include a past product example that demonstrates your skills and expertise.
- **References:** Please include the name, phone number and email address for two client references.

RFQ CALENDAR/TIMELINE

- Date sent out invites 2 December 2022
- RFQ responses due 15 January 2023 at 5 PM pacific time

All proposals and submissions are to be sent to gsuarez@mercycorps.org

All questions or requests for clarification to be sent to gsuarez@mercycorps.org before the RFQ due date.

V. Other Terms & Conditions

WITHDRAWAL OF RFQ

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

RFQ COSTS

All costs incurred in the preparation and presentation of Proposals to the RFQ shall be completely absorbed by the responding party to the RFQ. All documents submitted as part of the RFQ will become the property of 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/quotes, to waive any irregularities in any quotation 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 RFQ, 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 RFQ.

LIMITATIONS

Mercy Corps reserves the right to reject any and all Proposals / Quotes and to waive any informality in the solicitation process. Total quotation length, excluding cover letter, details of professionals who will provide services, and contact information of client references, should not exceed 10 pages.