



**MERCY CORPS**

**Request for Proposal - Street Canvassing Company**

**Tender number HQ340.....**

**Tender available from 12 December 2022\_\_\_\_\_**

**Tender submission closing date .....6 January 2023.....**

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# I. Mercy Corps Overview

Mercy Corps (MC) is a global team of humanitarians working together with communities – and the most marginalized within them – to cope during crises, adapt to evolving challenges, and thrive into the future. We strengthen sources of resilience to enhance the capacities of people, markets, and institutions to handle shocks, reduce risk, build more equitable and responsive systems, and improve wellbeing.

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 5,400+ MC team members are focused on working with communities on food security, peace and good governance, water security, and economic opportunities. We're committed to creating global change through local impact — 84 percent of our team members are from the countries where they work. Our five commitments in every program are to be climate smart, evidence driven, innovative and creative, locally led, and safe, diverse, and inclusive.

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 40 years.

## A glimpse into Mercy Corps' impact in 2021:

- 13.7 million reached with clean water and hygiene support
- 10.8 million people reached with agricultural support
- 7.5 million people reached with financial services support
- 54 active programs to build peace within communities

See more details about our mission and impact at [mercycorps.org](https://mercycorps.org) and learn about our new strategic plan, Pathway to Possibility, at [mercycorps.org/pathway](https://mercycorps.org/pathway)

# II. Project Background and Context

## Project Summary

Mercy Corps (MC) is requesting a canvassing vendor to support a pilot initiative to determine if face to face marketing is a viable stream to recruit new monthly donors for the organization. As part of this pilot, Mercy Corps is working on an accelerated timeline and must have the pilot completed by June 30, 2023, testing in 2-3 markets.

## Partners in Possibility Background

The canvassing pilot will focus on recruiting new donors for Mercy Corps' monthly giving program, Partners In Possibility. Monthly donors first started at Mercy Corps in the 1980s. The name of the program has evolved over the years and was recently rebranded as Partners In Possibility in January 2022. The program currently has over 15,000 monthly givers and Mercy Corps is looking to add new acquisition streams, such as face to face marketing.

### III. Desired Services & Scope of Work

#### Capability Requirements:

- Establish scripting and support of offer development process
- Creation and set up of donor intake form to collect donor information via tablet
- Ensure all completed donor intake forms contain the name and address of the Supporter, the Supporter's payment information, Recruiter's name or other identifier, and data fields agreed by Mercy Corps and chosen vendor.
- Develop materials by coordinating with Mercy Corps' creative team including leave behind brochure, and any other collateral materials needed for new sign ups
- Coordinate with Mercy Corps on apparel/uniform to be worn by the canvassers
- Develop fundraiser training materials with approved messaging and guidance from Mercy Corps
- Train and manage canvassers to ensure high quality standards as outlined by Mercy Corps.
- Secure all necessary permitting and registration as required by Federal, State, and Local jurisdictions to conduct canvassing.
- Conduct call verification to confirm sustainers intended to initiate a monthly gift to Mercy Corps.
- Ability to accurately forecast and manage monthly joins and 1x gifts as part of this pilot.

#### System Integration & Data Security Requirements

- Vendor must be able process the sustainer and 1x gifts via a dedicated donation page set up by MC or through Braintree payment processor via API calls.
- Vendor must be able to set up a daily export of new sustainers and 1x gifts using the agreed format via SFTP portal including the following fields:
  - the name of the Supporter, email address and physical address
  - the amount of the proposed donation
  - payment method
- Integration with established credit card information, maintain PCI compliance in accordance with PCI DSS security standards.
- Capture ACH signup authorizations
- Support of Mercy Corps' project management tool Wrike.

#### Reporting Requirements

- Provide daily report of all on the ground activity tracking 1x gift and sustainer sign ups
- Develop weekly performance report to communicate progress towards budget and donor acquisition goals
- Provide weekly expense reconciliation with the Mercy Corps business owner.
- Vendor to manage a weekly donor services log of issues and action items to document and resolve customer services issues.
- Vendor to provide a weekly cancellation report to Mercy Corps

### 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 RFQ or RFP? (0-25)
- Technical Criteria: Includes the bidder's understanding of the service or procurement required, bidders' management plan, supplier's qualifications and bidders' overall resources. Does the supplier have the right qualifications (registration, insurance, experience)? (0-25)
- 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. (0-25)

- **Cost Criteria:** Is the cost within any predetermined price range, such as cost estimates from a market analysis? In most cases cost is evaluated using value for money unless otherwise directed by donor requirements. (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. Each proposal should be no longer than 15 pages including requested samples and cost template. Submit proposal as one (1) PDF document including all appendices. Standard proposal formats are acceptable provided the following information is included:

### (A) Basic Information

1. Name, address, telephone number and email address for principal contact.
2. A brief outline of your organization and services offered, including:
  - a. Full legal name, jurisdiction of organization or incorporation and address of the company
  - b. Full legal name and country of citizenry of company's Principal Owners, and all other officers and senior managers of the company
  - c. Year business was established
3. Name and professional qualifications of personnel who would provide the services.
4. Number of canvassers employed
5. What markets currently working/permits active
6. Provide coverage limits for General, Commercial and Professional liability insurance.
7. Detail fundraising compliance management by state
8. Share how you permit and register to canvas in state, and local jurisdictions.
9. Does your company use subcontractors for canvassing or other work? If yes, please explain.
10. Describe the account management team structure and expected weekly communication with the business owner.

### (B) Project Specific Information

1. Provide a Timeline to support intended completion of the pilot by June 30, 2023, include in timeline each phase or provide a checklist necessary to go live.
2. Detailed summary of approach, launch markets, recommended offer and pitch highlight and projections of how many sustainers are possible by week per test market.
3. Provide a 3-year forecast (July to June) including revenue and expenses projecting future investment recommendations if canvassing pilot is successful.

### (C) Past Work/Samples

1. Provide reporting samples mentioned in the above reporting section and/or provide samples of your typical suite of client facing reports.
2. 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.
3. Provide insight into experience working with an International Relief client.
4. Top 2 clients (names not required) and provide number of sustainers acquired annually for the past year.

### (D) Canvasser Management

Please share one to two sentences explaining each step in your process for the day-to-day operations:

1. Recruiting Process
2. Training Process
  - a. Client intends to be onsite with training and market kickoff.
3. Compensation system
4. Prospect experience management
5. Donor acquisition validation process
6. Performance management
7. Brand management

### (E) Cost Requirements

Provide estimates fees for the following services:

<u>Fee Category</u>	<u>Estimated Fee</u>
Recruiter Fee	
Acquisition Fee	
Printing or Collateral Costs	
Cancellation and/or Claw back Stipulations to Acquisition fees	
Credit Card Transaction/Processing	
Data or Digital Upload Requirements	

If vendor's fee does not fit into one of these categories above, please add rows as necessary.

### **CONTACT FOR BID INQUIRIES**

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

- Lillian Kagai, [lkagai@mercycorps.org](mailto:lkagai@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](http://www.mercycorps.org/tenders)

### **RFP CALENDAR/TIMELINE**

- RFP published December 12, 2022
- Question and Answer period December 12-December 19, 2022
- RFP responses due January 6, 2023
- Vendor meetings week of January 17-27, 2023
- Vendor selected and notified End of January/Early February

All proposals and submissions to be sent to [tenders@mercycorps.org](mailto:tenders@mercycorps.org) with the tender number and tender description in the subject line.

## **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.

## **VII. Sample Contract**

This is the anticipated contract and is a condition to the tender. However, if required, additional terms and conditions may be added by Mercy Corps in the final contract.

Sample Contract found as **Attachment 1. Service Contract Sample.**

Any deviations or justifications from this contract must be set out in the tender proposal with proposed alternative language.