

Organization Name
Request for Proposal (RFP)
Direct Response Television Marketing and Fundraising Services
Date Issued: Month Day, Year

1. NOTICE TO VENDORS

With this Request for Proposals (RFP), **XXX** solicits proposals from vendors to perform direct response television marketing, public education and fundraising services. In issuing this **RFP**, **XXX** makes no commitment to contract for work with any vendor(s) responding to this RFP either within the dates specified in the RFP or at any other date(s). **XXX** will not reimburse vendors for any expenses or pay for any implied services associated with responses to this RFP – vendors choosing to respond to this RFP must do so entirely at their own expense. **XXX** agrees to maintain all vendor proposal materials as private and confidential and not to display or disseminate them to any individuals other than those evaluating their contents for purposes of this RFP. All proposals and collateral materials submitted in response to this RFP become the property of **XXX** and will not be returned to vendors.

2. RFP INTRODUCTION

2.1 RFP Purpose

With this RFP, **XXX** solicits proposals from vendors for direct response television marketing, public education and fundraising services.

With the replies from this RFP, **XXX** may select one or more vendor agencies to manage and implement all aspects of a comprehensive direct response fundraising, marketing and public education campaign.

2.2 Schedule of Events

This following schedule of events should be considered definitive. **XXX** reserves the right, however, to adjust any of these dates as necessary to meet its needs. In the event any of the dates are adjusted, **XXX** will send information about the date changes to all vendors to whom this RFP originally was distributed, plus any other vendors that have made their interests known to **XXX**

- | | |
|---|------|
| a) Formal release of the RFP | date |
| b) Last day to submit questions or comments | date |
| c) Release of RFP revisions, answers to questions and additional comments by XXX | date |
| d) Proposals due to XXX by 5:00pm | date |
| e) XXX invites selected vendor(s) to make presentations | date |
| f) XXX begins formal decision and negotiation period | date |
| g) XXX announces final contract award decision(s) | date |

Following step e) above, **XXX**, at its discretion, reserves the right to request one or more vendors to submit a “best-and-final-offer,” which may involve targeted changes to

the requirements stated in this RFP. In this event, the dates for steps f) and g) above will be modified to allow time for the best-and-final-offer to be prepared.

3. BACKGROUND ON XXX AND THIS RFP.

3.1.1 Current Situation

XXX has a robust direct mail and digital media program. It now seeks to expand into direct response television and to better understand the economics of pursuing this medium. [Insert here: additional information on your direct response program including how you utilize other channels, number of donors, etc. Also include information on your internal challenges, including creative guidelines and how you work with other departments within the organization. A discussion of your current sustainers program would also be helpful here.]

3.1.2 Ancillary Vendors

XXX currently manages its own caging and database. If different services will need to be provided to supplement these in order to conduct effective DRTV campaigns, the offeror should specify those changes and recommend vendors to conduct them.

[Insert here: any additional vendor(s) or subcontractors which is (are) needed to provide any other ancillary services (e.g. analytics, modeling, back-end fulfillment, etc.), as well as your current call center relationships, online platform and credit card processor/gateway. Describe your history with any named vendor.]

3.1.3 Available Video Resources and Internal Support Staff

[Insert here: Information on currently available video resources, PSAs, routinely recorded video used for web, for programs, for major donors, or any other purposes. Insert information on the availability of internal support staff to assist with securing case histories: beneficiaries who will, with a waiver, permit their images and voices to be used in direct response television. Information regarding any celebrity spokespersons.]

4. GOODS AND SERVICES DESIRED

XXX seeks a vendor to work with it to develop, test, manage, and implement all aspects of its direct response television program. This will include public education and fundraising appeal strategies, design and creation of direct response television video and supporting materials and television airtime purchasing, recommendations regarding the receipt of and accounting for donations from this channel, call center set-up and management, microsite set-up and management, acknowledgement and fulfillment process, recommendations regarding any additional or special data processing requirements and all subsequent data analysis and reporting.

XXX wants an integrated solution with a single point of contact. If the vendor intends to use other subcontracting agencies to fulfill some aspects of the DRTV fundraising campaign, this must be known by, but should be functionally transparent to XXX. In this case, this proposal must reveal explicitly who the intended subcontractors are and their

XXX RFP for DRTV

roles in the fundraising work including producer/directors. This proposal also must include costing for all aspects of the work, including those that will be performed by subcontractors, and the vendor must accept accountability and final responsibility for the quality and timeliness of everything done by the subcontractor(s). Pricing need not be provided for services independently contracted for by XXX as noted above.

Your proposal also should explain your philosophy toward and your approach to integrating direct mail and digital media with XXX's other fundraising channels and ongoing fundraising campaigns.

The performance period for this agreement should begin on **Month Day, Year** and end on **Month Day, Year**.

Proposals should explain in good detail the vendor's proposed processes for working with XXX, formulating DRTV program and fundraising strategies and budgets, designing and creating direct response television ads and purchasing of ad time, selecting networks and television shows and developing test strategies, reporting results, holding account reviews, modifying fundraising plans based upon empirical results, and coordinating with other aspects of clients' overall fundraising operations. Please include existing DRTV examples on a DVD and any analytical reports, etc. to help explain your proposal.

Your proposal must clearly specify your plans for acquisition of donors/leads, fulfillment and thank-you responses, etc. You must make clear how and when you will introduce and test new video, reuse old video, test networks and channels, etc.

XXX will advance necessary costs from its own funds and will have ultimate responsibility for all costs or expenses associated with the marketing efforts. XXX will exclusively control, manage, and exercise dominion over all funds donated to it and any lists of donors created as a result of this relationship.

[Insert here: information on your phased approach to the DRTV program: assessment, testing and rollout phases. Importance of having a "one stop shop" manage the DRTV pilot]

The selected bidder will be expected to provide the following services as it relates to the DRTV campaign. Provide detail on your approach to the following and include if these services will be provided in-house or by a vendor/subcontractor:

- a. Evaluation of the marketplace
- b. Creative development
- c. Acknowledgement/Response fulfillment
- d. Managing the data flow
- e. Media buying and tracking
- f. Digital integration
- g. Direct mail integration
- h. Call center set-up and management

Your proposal should answer the following questions:

- What DRTV experience do you have? Please provide a list of other nonprofit clients for which you have conducted DRTV fundraising campaigns as well as the annual media billing range that you are handling for each of those clients.
- How can you help us maximize the value of our airtime spend? Please explain your media buying and tracking approach.
- What experience do you have in setting up and coordinating a cohesive multi-channel response system?
- Describe how you would use other channels including direct mail, digital media and telemarketing to support and optimize the DRTV effort.
- Do you anticipate any licensing fees for video, music, or otherwise? Are those included in your budget projections?
- Will your organization set-up and manage any call centers? What management tools will you use?
- What training for call center operators do you recommend and will your organization be involved in such training? How do you supervise call center effectiveness?
- Describe the back-end acknowledgement and fulfillment process and how you will manage it.
- What premiums would you recommend? Describe your premium procurement process.
- Will your organization provide other support for and mechanisms to capture responses to the TV ads?
- Will your organization manage payment processing?
- Describe and provide examples of your reporting of results, tests, etc.
- Explain the role of joint cost allocation in DRTV (if any).
- How do you secure celebrities or what is your fee structure for securing star talent?
- How many full service production crews/studios groups do you have in house?
- List all required steps and functions your firm provides internally to facilitate a turnkey DRTV Test.

5. PROPOSAL REQUIREMENTS

5.1 General Instructions

5.1.1 Format

[Insert here: Any instructions you wish to provide relating to the appearance of the proposal. For large proposals, with many replies expected, it is easier to evaluate the proposals if they all come to you in the same format. In this section, you can provide a complete proposal outline that you either recommend or require vendors to follow for their proposals. You may also simply give a list of required content, with or without page number restrictions. To make it easy to read and evaluate, you should require all proposals to have: 1.25-inch left and right margins, 1-inch top and bottom margins, 12-

or 14-point typeface using only Arial or Times Roman fonts, and consecutive numbering of ALL pages, with the exception of Attachments. If you expect to have different people evaluating different parts of the proposal (e.g., separate evaluation of the budget or contract), it helps to require types of binding (e.g., three-ring notebook) that make it easy to separate the proposal into component parts. If you expect electronic documents, specify all proposals to be submitted in a “write-protected” format, such as a pdf file or a Word file that is locked against modification with a password.]

5.1.2 Proposal Submission Instructions

[Insert here: Instructions on how to package the proposal, where and when to deliver it, and how many copies. Specify if you want to require an electronic file delivered instead of or in addition to hard copies. Because of the file size of any video samples you may wish to specify an FTP site or that such content be submitted on DVDs.]

5.1.3 Inquiries

All suggestions and inquiries pertaining to this RFP should be addressed to:

(Salutation) (First Name) (Last Name)
Formal Job Title
Address
Telephone Number (Times to phone)
Email Address

Suggestions and questions about the RFP may be sent via post or email to XXX until **Month Day, Year** and after that date, no further comments or inquiries will be accepted. Answers to all questions will be distributed to all vendors as quickly as possible. XXX reserves the right to modify the RFP based on these comments and questions, as well as its own predilections, up until **Month Day, Year**. All final RFP modifications will then be distributed to all vendors.

5.2 Proposal Content Requirements

5.2.1 Statement of Work

The vendor must provide a complete explanation of the policies, processes, tools, procedures, schedules, reports, etc. that will be used to deliver the desired goods and services as described in, and covering all questions raised in, section 4 of this RFP.

5.2.2 Staffing

The vendor must name a specific person who will act in the capacity of Account Executive for XXX. For this person, the proposal must include:

- A detailed biography or resume
- A job description for the person vis-à-vis this contract
- A chart showing the person’s place in the vendor’s organization
- Identification and functional description of this person’s manager or superior
- Office location

The proposal must identify, at least by job function, other agency staff who will assist in successfully performing the work on this contract.

If vendor will be making use of subcontractors, the key person for each subcontractor should be identified and a bio or resume should be provided.

5.2.3 Agency Description

The proposal must include:

- A brief history of the vendor's organization
- Current agency descriptive information
- Names, addresses, phone numbers, and email addresses of at least three current and one previous clients, whom we may contact for references

5.2.4 Management and Quality Assurance

Your proposal must explain the management processes your agency uses regularly to ensure that the products and services you provide are timely, correct, consistent, complete, and high in quality. Please explain any policies you have related to warranties of your work, and how those policies are implemented and enforced. Explain the avenues of recourse XXX will have in the event it is not pleased with the services and products it receives from you.

5.2.5 Samples of Previous Work

As an attachment to the proposal, please submit at least two examples of DRTV fundraising materials prepared for current or recent clients. These materials will be kept confidential and they will not be returned.

5.2.6 Affirmations

Your proposal must affirm ALL the following statements. In doing so, please fill in the required information. You must explicitly reveal and explain any exceptions to or deviations from these statements.

- a) The ____ Agency is properly registered and/or bonded in all states requiring charitable solicitation registration and has no current state regulatory enforcement actions pending against it relating to charitable registration or fundraising that would interfere with XXX's ability to fundraise in any and all jurisdictions.
- b) None of the ____ Agency, or its officers, directors or owners, nor any current client of the ____ Agency has any state, federal, internal revenue, postal, federal trade commission criminal enforcement actions pending against it, nor have any of these organizations or individuals had such an action pending or current in the past 36 months to the best of the knowledge of any officer, director or owner of the Agency.

5.2.7 Signature

Your proposal must be signed by an owner, principal, officer of the corporation, or another person who is legally authorized to enter into agreements on behalf of your agency.

5.3 Price Proposal, Fees, Expenses, and Expected Returns

The proposed pricing of vendor agency products and services must encompass all anticipated expenses. These might include creative and production fees, artwork, ad buying, production of final version video, overnight mail and courier costs, data processing and analytical costs, costs for outside consultant services, etc.

Wherever possible, revenues should be expressed both as total amounts and in terms of costs per donor acquired.

5.3.1 One-Time Setup Costs

The vendor must provide complete, detailed information on ALL the one-time setup costs that XXX will incur. The timing (and cash-flow implications) of these costs must be clearly indicated.

5.3.2 Ongoing Fees and Costs

Your proposal must include complete, detailed information on ALL ongoing fees that will be incurred for the direct response television fundraising campaign.

If you wish to propose services based upon a monthly management fee, summarize all aspects of what the fee will include (e.g., staff time, creative) and what additional expenses will be required as separate charges.

If you wish to propose fees based upon itemized expenses, summarize all the items that will be included therein and provide your estimates of what a “typical” billing would be.

If you are doing any pass-through billings from suppliers or subcontractors, your proposal must show what those are, along with estimates of a “typical” billing period, and complete disclosure of your company’s related markups and commissions if any.

If any other related services will be required for the direct response television campaign that your agency will NOT include in its package, you must identify what those are, explain why your agency chooses not to provide them, and recommend how XXX should best procure those services.

Your proposal should fully explain optional, additional, special, and alternative services, which are related to but not necessarily required for the direct response television campaign, that your agency can recommend or make available to XXX, along with the financial and non-financial benefits or reasons for XXX to choose those options. Estimate and explain the costs of these options.

Your proposal should include a comprehensive, best-guess, three-year budget for the direct response television campaign that would be your agency's strongest recommendation. Describe clearly all the elements of this campaign.

5.3.3 Realistic Return Estimates

The vendor should explain realistic estimates of the return on investment for these fundraising services. Based upon the best-guess campaign recommended, realistically estimate expected cash flows and revenues and show them as a function of time for a period of at least three years. Include estimated LTV, monthly and long term cash flow and ROI. The vendor should make clear all the assumptions inherent in these estimates.

5.4 Contractual Requirements

[Insert here: All information or considerations you wish to have included in a contract. If you have a standard contract you want the vendor to accept, state that here and include it as an attachment to the RFP. Also explain the vendor's options (if any) to modify the contract or certain clauses within it. You should specify that the vendor's proposal (with all subsequent modifications and attachments) will be a required addendum to the contract, and that negotiated departures from the language of the proposal must be stated explicitly in the contract. Other key information you should have in a contract includes (but is not limited to):

- Key staff provisions
- Provisions for data ownership and intellectual property rights
- Agreements on privacy and confidentiality
- Agreements on exclusivity
- Agreements not to hire each other's staff
- Invoicing terms and payment schedules
- All fees and contingency fees
- Provisions for reimbursement of expenses
- Warranty provisions
- Staff hours of availability (both directions)
- Provisions for making changes to the contract
- Consequences for nonperformance
- Insurance, indemnification, and bonding requirements
- Conditions and procedures to terminate the agreement]

5.5 Proposal Evaluation Criteria

XXX intends to enter into a contract with the vendor(s) that provide XXX the best value and benefit, not necessarily on the basis of the lowest price.

[Insert here: A detailed explanation of how the winning proposal will be selected. A common and easy way to do this is to create a list of important proposal aspects and the possible points to be awarded for each, totaling 100 or 1000 points. Be aware that vendors will write their proposals in order to maximize their point counts. This means they will provide much information for proposal attributes that might yield high point counts and little or no information for attributes that have low or nonexistent point counts

– so be sure to design the evaluation criteria accordingly. You will get what your evaluation criteria ask for. The level of detail to which you drive down your point breakdown is up to you.

Here is an example of a fairly high-level evaluation scheme:

To select the winning vendor, XXX will use the following evaluation method.

1) Threshold Criteria – Before judging proposals on their merits, XXX will eliminate all proposals that fail to meet these criteria:

- Adherence to submission instructions (including deadlines)
- Adherence to format guidelines
- Positive fulfillment of all the Affirmations (section 5.2.6)
- All contractual terms agreeable to XXX

2) Merit Criteria – XXX will award merit points to each proposal. A proposal can earn up to 1000 points. The evaluation criteria and their point values are these:

2A) Organization background, reputation, stability (250 points). Factors that will be included in this criterion are:

- Successful history of business and ethical reputation (45 points)
- History of successful fundraising in our area of concern (45)
- Reports from references (45)
- Control relationships to subcontractors (if any are needed) (45)
- Financial stability (45)
- Miscellaneous extras (25)

2B) Pricing (350 points). Factors that will be included in this criterion are:

- Overall cost of work (setup and ongoing) (55 points)
- Reasonable markups and commissions (45)
- Presentation of options (35)
- Realistic estimates (45)
- Likely ROIs (55)
- Clarity of budgets and plans (35)
- Completeness of financial considerations (45)
- Miscellaneous extras (35)

2C) Agency approach (400 points). Factors that will be included in this criterion are:

- Fundraising approach and methodology (80 points)
- Proposed staffing (55)
- Quality and appeal of work plans and processes (70)
- Management and QA plan (65)
- Creativity in approaching our needs (50)
- Quality and appeal of samples (50)
- Miscellaneous extras (30)]