



**REQUEST FOR PROPOSAL (RFP)**

<b>RFP #:</b>	FY24-Direct Response Fundraising-001
<b>Purpose:</b>	Lutheran World Relief (LWR) seeks a vendor/agency to develop, test, manage and implement all aspects of its integrated multi-channel direct response fundraising program. This will include fundraising appeal strategies for all donor groups including acquisition, retention, pipeline development, lapsed reactivation and sustainer donor conversion.
<b>Contract Type:</b>	Long-term agreement (Option to renew conditional on performance/fulfillment of KPIs)
<b>Issuance Date:</b>	<b>March 4<sup>th</sup>, 2024</b>
<b>Deadline for Intent to Bid:</b>	<b>March 7<sup>th</sup>, 2024</b>
<b>Bid Submission Deadline (Date of Receipt):</b>	<b>5:00 pm EST, April 2<sup>nd</sup>, 2024</b>
<b>Question submission deadline</b>	<b>March 14<sup>th</sup>, 2024</b>
<b>Answer to Questions date</b>	<b>March 21<sup>st</sup>, 2024</b> Responses to all questions submitted will be shared with all participant bidders.
<b>Anticipated Award Date:</b>	<b>May 2<sup>nd</sup>, 2024</b> (Process includes interviews)
<b>RFP Contents and Attachments</b>	<ol style="list-style-type: none"> <li>1. Introduction</li> <li>2. Scope of Work &amp; Background</li> <li>3. Instructions to Bidders</li> <li>4. Technical and Financial Proposal Evaluation <ul style="list-style-type: none"> <li>• Annexes <ul style="list-style-type: none"> <li>➤ Attachment A- Small Business Certification Form</li> <li>➤ Attachment B- Proposal Cover Page</li> <li>➤ Attachment C- Budget (required template supplied as an Excel document)</li> </ul> </li> </ul> </li> </ol>

## Corus Procurement Ethics

Corus International and its family of organizations are committed to a transparent and ethical procurement process aiming to achieve the best value for money, fairness, integrity, and doing business in compliance with the US government regulations, the beneficiaries, donors, and partners' interests.

Corus does not allow accepting any monetary transaction, gratuity, or compensation of any type from current or potential vendors or suppliers in exchange for or as a reward for a business. Therefore, all potential vendors and suppliers taking part in this solicitation must not offer fraud, bribery, or kickback to an employee or staff of Corus. Any vendor or supplier violating these standards will be automatically disqualified from doing business with Corus in the future.

A comprehensive list of Corus's ethical standards as well as information on how to report any violation pertaining to this solicitation (Corus's Integrity and Ethics Reporting Hotline) is found here: <https://corusinternational.org/ethics-and-policies-corus-international>.

### 1- INTRODUCTION:

Belief in action.

This is how we approach our audacious mission: to urgently end poverty, suffering and injustice wherever they afflict humanity. In the world's most difficult places, we invest in individuals, families and communities to work together to find lasting solutions to the challenges they face.

Our steadfast donors are the heart of this mission. They have tirelessly cared for their global neighbors since 1945. Driven by faith, these donors have shown they won't stop ... until their love reaches every neighbor. They rise to the challenge when emergencies strike and when they receive a monthly appeal. They look out for future generations through mindful estate planning. And this love goes both ways. Through authentic storytelling, donors feel love in return from their neighbors.

Driven by our bold mission, we continue to grow and change. In 2020, Lutheran World Relief established a new organization called Corus International to unite us with an array of world-class humanitarian organizations, so that we can do more than ever to reach our global neighbors in need. Together, we can go further than we ever could alone.

Now, our global neighbors need us more than ever. That's why our goal is to double our revenue over the next 5 years. We know it is possible because we have achieved such success in the last 5 years. We need passionate partners who will help us do it again.

### 2- BACKGROUND & SCOPE OF WORK

## WHERE WE ARE NOW

Our Global Relationships and Resources division oversees the contributory revenue given by individual donors and U.S. Lutheran congregations. Our fundraising staff, led by an Associate Vice President, includes our Major Gift team of six Regional Donor Advisors, our Senior Director, our six-member Congregational Engagement team, and our Director of Annual Giving & Development who manages Lutheran World Relief's direct response program and corresponding vendor relationship. We also have a Senior Director of Fundraising Operations, who manages our data, analytics and modelling. Our current vendor provides: counsel on overall direct response strategy, appeal copywriting and design, predictive modeling and data segmentation, acquisition list management (via rentals and exchanges), printing and mailing, digital strategy and campaign management, results analysis, vendor management, and yearly overall donor performance analysis. Lutheran World Relief's current direct response vendor will be allowed to respond to this RFP. Lutheran World Relief's gift processing is handled primarily in-house.

### **House File Description**

Lutheran World Relief has approximately 308,000 mailable names on file, of which approximately 79,000 have given a gift in the last 2 years. In FY23, we had 14,813 new donors, 50,916 donors who gave in the current FY, 29,797 multi-year donors (gave each year for the last 2+ years), 2667 monthly sustainer donors and 57,935 13-60 month lapsed donors. In FY23, 14% of our contributory revenue was received through digital channels – this percentage is expected to increase in FY24. The direct response vendor has historically been responsible for 70% of all online giving. Lutheran World Relief currently has email addresses for 150,000+ of our constituents.

### **Current Direct Response Program**

Lutheran World Relief's current direct response program includes 13 direct mail appeals with integrated digital components, 8 direct mail acquisition appeals, a quarterly Special Reports newsletter mailing, a lapsed donor win-back campaign (4X), a second-gift conversion campaign (18X) and 2+ high-dollar donor campaigns. Additionally, we are prepared to send an integrated emergency appeal immediately following large-scale disasters.

Our current digital program includes an email component with 1 to 8 email sends per integrated appeal, 4 online only campaigns, 4 monthly donor conversion appeals, a monthly donor lead generation campaign series, and occasional single cultivation and emergency response emails. Digital advertising includes 12 social campaigns per year (2 to 3 versions per campaign), 4 display advertising campaigns per year (2 to 4 versions per campaign), monthly donor social and display advertising campaigns (4X), and a lead gen social campaign. Additionally, our integrated strategy includes website hero image, lightbox and widgets (12X), as well as solicitation and cultivation text messages (17X). Outside of these planned campaigns, we maintain an evergreen, always-on approach to digital advertising with brand and non-brand paid search, paid social, and display targeting both remarketing and prospecting audiences. We are looking to increase our digital footprint with additional channels if ROI targets can be achieved.

We also have an alternative giving catalog program called Gifts of Love, which mails 3 times per year to current donors. This direct mail piece is supported by an integrated email and digital/social advertising campaign 2 times per year.

In FY24, Lutheran World Relief will mail 900,000 pieces of renewal appeal mail and 1,675,000 pieces of acquisition mail. We anticipate increasing our acquisition quantity to 3,000,000 pieces in FY25. We also expect 2.7 million email sends in 23 email campaigns (including integrated and standalone fundraising and

cultivation emails).

The organization will operate on an October 1 to September 30 fiscal year, and we expect our vendor to help with our forecast, budget and annual plan activities (February-June) each year.

### **Internal Support Staff**

Our Director of Annual Giving & Development is the internal staff who oversees Lutheran World Relief's direct response program and is the vendor's main point of contact. Additional in-house staff support includes the Senior Director of Development, Associate Vice President of Global Relationships & Resources, the Senior Director of Fundraising Operations, the Database Manager, the Senior Director of Marketing & Communications, the Director of Content & Integrated Marketing, the Associate Director of Visual Design & Web Strategy, the Associate Director of Digital Marketing & Fundraising, and the President/CEO.

### **Timeline and Reporting:**

Title or proposed position/work: Direct Response Fundraising Program

Location: USA; location flexible

Reporting to: Director, Annual Giving & Development

Anticipated Start Date: October 1, 2024 (anticipating first campaigns to launch in January 2025)

Anticipated End Date: December 31, 2027, with option to renew an additional two years contingent on performance

Individual/Firm or Contract type – Deliverables (specify deliverables) or LOE based (# anticipated days/months), Other (please specify): One or more firms producing agreed-upon multi-channel campaigns (see full Scope of Work) over the course of three calendar years.

### **Preferred Qualifications and Competences:**

- The agency must demonstrate a minimum of 10 years of experience in multi-channel direct response with an illustrated track record for driving growth
- Agency experience with international NGO clients highly preferred
- Agency experience with faith-based donor base highly preferred
- Assigned Account Executive must demonstrate a minimum of 7 years of experience in multi-channel direct response with an illustrated track record for driving growth
- Access to and demonstrated experience with cutting edge multi-channel technology, tools, and systems

## **SCOPE OF WORK**

Lutheran World Relief seeks a vendor/agency to develop, test, manage and implement all aspects of our integrated direct response fundraising program. This will include fundraising appeal strategies for all donor groups including retention, lapsed reactivation, acquisition, and sustainer donor conversion. Proposals should include plans for integrated direct mail and digital campaign strategy, design and creation of campaign materials, digital advertising media buying and optimization, list brokerage and management, budget tracking, printing and mail house oversight, management of data segmentation and predictive modeling, and all subsequent data analysis and reporting.

Growth is our goal. Revenue growth. Donor growth. Most importantly, our ability to grow our programs and serve our mission throughout the world. We are seeking a partner that understands the importance of

a forward-thinking direct response fundraising program as the key to transformational core donor growth. Proposals should address key growth issues such as maximizing donor retention, sustainer donor conversion, donor upgrading and feeding the pipeline toward major and bequest giving.

To achieve our ambitious and aggressive goals, we need an integrated fundraising solution with agency partners who are experts in their field and can work alongside us for the next 3 years.

To that end, an agency may submit a proposal for a portion of the fundraising program (i.e. direct mail, digital, acquisition, etc.). In this case, the proposal must contain strategies for creating and maintaining seamless campaign and messaging integration with other vendor partners and team members, as well as the added value the agency brings to that segment.

The performance period for this agreement should begin on October 1, 2024 (anticipating first campaigns to launch in January 2025), and end on September 30, 2027.

### **3- INSTRUCTIONS TO BIDDERS**

**RFP:** This RFP constitutes an invitation to prospective Bidder(s) (“Bidder”) to submit proposals (“Proposal”) for the services described herein. It consists of (1) Cover Page, (2) Overview, (3) Scope of Work (4) Instructions for Bidder(s).

**NOTIFICATION OF INTENT:** Each prospective Bidder receiving a copy of this RFP shall, within 3 business days, email an intention to submit or not to submit a proposal addressed to [lwrproposals@lwr.org](mailto:lwrproposals@lwr.org).

All Proposals must be in English, signed and dated by an authorized employee of the Bidder. In addition to the required documents requested, proposals can include additional items such, i.e., templates, brochures, media, etc.

Proposals should explain in good detail the agency’s proposed processes for:

- working with our in-house team
- formulating program and fundraising strategies and budgets
- setting yearly schedules
- developing donor-centric campaign materials
- managing data selection
- developing test strategies
- reporting results and holding account reviews
- modifying fundraising plans based upon empirical results
- coordinating with other aspects of clients’ overall fundraising operations

Budget components must be completed using the template provided, including breakdown of retainer costs.

Proposals should also include detailed reporting plans and proposed processes for working with our in-house fundraising, marketing/creative, data analysis and reporting teams to ensure cohesiveness of KPI

data points across organizations, as well as any additional exclusive reporting services the vendor possesses.

Please include existing mail package examples or mock-ups of mail plans, appeal letters, email and digital creative examples or mock-ups of cadence calendars, analytical reports, etc. to help explain these items. Where relevant, estimated costs should be shown. We are also seeking a detailed description of the digital technology stack used by the agency, showing the relationship of platforms, vendors, and teams assisting in deployment of marketing strategy.

Proposals must clearly specify plans for acquisition, retention, lapsed reactivation and moves management including sustainer donor conversion. Please also detail how and when new strategies and creative will be tested, including test package characteristics. An audience segmentation approach and donor journey mapping document are required.

### **Proposal Requirements**

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

Your proposal must specifically include the following content:

- A brief history of the agency
- Current agency descriptive information
- A list of the agency's five largest (by work volume) current clients
- A description of the agency's direct mail house partners and capacity
- Names, addresses, phone numbers, and email addresses of at least three current clients and one previous client, whom we may contact for references
- Names of ALL other current or recent clients engaged in programs similar to those of Lutheran World Relief
- A proposed multi-channel direct response plan scheduled for the fiscal year (October 1, 2024 – September 30, 2025)
- A corresponding comprehensive budget that outlines all costs Lutheran World Relief may incur. Budget components must be completed using the provided template, including breakdown of retainer costs.
- A proposal document explaining the proposed strategy, segmentation recommendations and predictive modeling services.
- A sample of reports and analysis that you will provide Lutheran World Relief on a regular basis
- A proposal (and timeline) for emergency campaigns that can get an appeal in the mail immediately after a large-scale disaster/emergency
- An explanation of the processes your agency uses to regularly ensure that the products and services you provide are competitively priced, timely, correct, consistent, complete and high in quality.
- Samples of previous work—please submit at least two examples of fundraising materials prepared for current or recent clients. (Note: These materials will be kept confidential, and they will not be returned.)
- A staffing plan (see the section below)
- Price proposal, fees, expenses and expected returns.

## Staffing

The successful agency must name a specific person who will act in the capacity of Account Executive for Lutheran World Relief. 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 plan in the agency's organization
- Identification and functional description of the person's manager or superior
- Office location
- Estimated percent of the person's time that will be dedicated to this account
- Names of other accounts this person would be involved with and in what capacity

The proposal must identify, at least by job function, other agency staff who will assist the Account Executive in successfully performing the work on this contract. The proposal must also address employee turnover and include a plan for onboarding new agency staff who will be working on the Lutheran World Relief account during the term of the contract.

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

In order to be considered, the proposals must be received by email to [lwrproposals@lwr.org](mailto:lwrproposals@lwr.org) **no later than 5 pm EST, April 2<sup>nd</sup>, 2024.**

Bidders are solely responsible to ensure the timely receipt of their proposals. Proposals received after the date and time required will, generally, not be considered unless no other proposals are received.

Prospective Bidders are under no obligation to prepare or submit proposals in response to this RFP and do so solely at their own risk and expense. LWR will not reimburse any costs incurred related to this RFP.

Proposals may not be altered or corrected after the Date of Receipt, except when LWR at its sole discretion, may permit correction of arithmetic errors, transposition errors, or other clerical or minor mistakes, in cases in which LWR deems that both the mistake and the intended proposal can be established conclusively on the face of the proposal.

Proposals must be valid for at least **NINETY (90) days** from the Date of Receipt.

In evaluating the proposals, LWR will seek the **best value for money**. Specifically, proposals will be evaluated on the basis of the following:

### **4- TECHNICAL AND FINANCIAL PROPOSAL EVALUATION:**

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

#### 4.1. Technical Criteria.

Evaluation Category	Rating - Points
Experience with multi-channel direct response with demonstrated track record of aggressive growth	20
Professional Profile/Staffing plan - <b>CV's must be included</b> (organizational Structure/Qualifications)	20
Quality of project approach and proposed strategy	30
Skills and Abilities that demonstrate the agency's experience within the INGO and faith-based sectors and scale of program similar to LWR's	20
Value for Money	10
<b>Total</b>	<b>100</b>

If at any time prior to award Lutheran World Relief deems there to be a need for a significant modification to the terms and conditions of this RFP, LWR will issue such a modification as a written RFP amendment to all competing Bidders. No oral statement of any person shall in any manner shall be deemed to modify or otherwise affect any RFP term or condition, and no Bidder shall rely on any such statement.

LWR may request additional information to clarify or substantiate information provided in the proposal or may request revisions to the proposed approach or personnel. After selection, LWR will negotiate the award cost with the selected bidder. A contract will be awarded after the selected Bidder undergoes a pre-award survey to assess the selected Bidder's management capacity and financial capability and after references have been verified.

LWR is not bound to accept the lowest bid or any proposal and reserves the right to accept any proposal in whole or in part and to reject any or all proposals.

LWR shall not be legally bound by any award notice issued for this RFP until a contract is duly signed and executed with the winning Bidder.

#### **Bidders should provide the following:**

- Articles of Incorporation
- Valid and Current Business License
- Proof of financial strengths (3-year Audited Income Statement or Balance Sheet)

Financial Proposal shall be stated in US Dollars (USD).

Prior to submission of any protest, all parties shall use their best efforts to resolve concerns raised by an interested party at the contracting officer level through open and frank discussions.

#### **The following procedures are established to resolve protests effectively:**



(1) Protests shall be concise and logically presented to facilitate review by LWR. Failure to substantially comply with any of the requirements may be grounds for dismissal of the protest.

(2) Protests shall include the following information:

(i) Name, address, and fax and telephone numbers of the protester.

(ii) Solicitation number.

(iii) Detailed statement of the legal and factual grounds for the protest, to include a description of resulting prejudice to the protester.

(iv) Copies of relevant documents.

(v) Request for a ruling by LWR.

(vi) Statement as to the form of relief requested.

(vii) All information establishing that the protester is an interested party for the purpose of filing a protest.

(viii) All information establishing the timeliness of the protest.

(3) All protests will be addressed to the contracting officer or other official designated to receive protests.

Protests based on alleged apparent improprieties in a solicitation shall be filed before bid opening or the closing date for receipt of proposals. In all other cases, protests shall be filed no later than five days after the basis of protest is known or should have been known, whichever is earlier.

### 4.3. TECHNICAL PROPOSAL OUTLINE

The Technical Proposal must include the following sections and attachments. Please refer to the detailed list on page 6 to ensure all elements are accounted for.

Section 1: Cover Page	(limit of one page, use the provided form in Attachment B or create one with the information required)
Section 2: Experience	Background and references
Section 3: Proposed Approach	Include a proposal for multi-channel annual program and one for emergency campaigns
Section 4: Samples of Work	Creative examples, client examples, and references
Section 5. Process explanation	For quality and price controls and for vendor collaboration
Section 6. Staffing and Structure	Account Manager CV/background, staffing plan, organizational chart

**ATTACHMENT A. VENDOR CERTIFICATION**

**CHECK HERE  IF NON-US BUSINESS PROCEED TO ATTACHMENT B  
CHECK HERE  IF US SMALL OR TRADITIONALLY UNDERREPRESENTED BUSINESS<sup>1</sup>- MARK BELOW ALL THAT APPLIES**

VENDOR NAME:

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1. Vendor is or is not a U.S. based small business? (If “no” – go to question 9, and answer question 9. If “yes” – continue with question 2.)
2. At least 51% of your company is owned by (or is more than 51% of the stock or equity owned by) one or more veterans, AND are the management and daily operations controlled by one or more veterans? YES NO
3. At least 51% of your company is owned by (or is more than 51% of the stock or equity owned by) one or more service-disabled veterans, AND are the management and daily operations controlled by one or more service-disabled veterans? YES NO
4. At least 51% of your company is owned by (or is more than 51% of the stock or equity owned by) one or more person who identifies as LGBTQ+, AND are the management and daily operations controlled by one or more person who identifies as LGBTQ+? YES NO
5. At least 51% of your company is owned by (or is more than 51% of the stock or equity owned by) one or more women, AND are the management and daily operations controlled by one or more women? YES NO
6. At least 51% of your company is owned by (or is more than 51% of the stock or equity owned by) one or more person who identifies as Hispanic, Black or African American, American Indian or Alaska Native, Asian, or Native Hawaiian or Other Pacific Islander people, AND are the management and daily operations controlled by one or more persons who identify with any of those groups? YES NO
7. Is your company a SBA certified small, disadvantaged business? YES NO
8. Is your company a SBA certified HUBZone small business? YES NO
9. Are you, is your company, or any one of its principal officers presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal Agency? YES NO
10. What is your company’s UEI #: \_\_\_\_\_?
11. When does your SAM (System for Award Management) registration expire: \_\_\_\_\_?

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<sup>1</sup> **Traditionally Underrepresented Business** (definition applicable in the United States): A business whose ownership (defined as having 51 percent or more of the stock or equity in the business) is composed of traditionally underrepresented groups including veterans, women, LGBTQ+, and Hispanic, Black or African American, American Indian or Alaska Native, Asian, or Native Hawaiian or Other Pacific Islander people.

**ATTACHMENT B. PROPOSAL COVER PAGE**

[Use this form or create one in this format]

<b>Name of Organization:</b>	<b>Primary Address:</b>
<b>Contact Name:</b> <i>(must be an individual with the authority to negotiate and enter into a contract)</i> <b>Title:</b>	<b>Telephone:</b> <b>Email (at least two):</b> <b>Website:</b>
<b>Type of Entity:</b> <i>(check one)</i> <input type="checkbox"/> Non Profit <input type="checkbox"/> For Profit <input type="checkbox"/> Other (specify)	<b>Year registered in &lt;INSERT&gt;:</b> <b>UEI # &lt;INSERT&gt;: REMOVE IF NOT APPLICABLE</b> <b>SAM Registration Status: &lt;INSERT&gt;: REMOVE IF NOT APPLICABLE</b>

Authorized Signatory: \_\_\_\_\_

Name and Title: \_\_\_\_\_

Date: \_\_\_\_\_