1 Introduction and Executive Summary

International Medical Corps is looking for a direct response marketing firm that can best meet our needs with competitive pricing. We are currently seeking a firm that can provide solutions for some or all of the area of needs listed below to drive unrestricted revenue. A firm may bid on digital services only, mail services only or both.

- Overall Direct Marketing Strategy: file growth, revenue growth, retention, increased ROI, Emergency donor conversion, sustainer conversion, testing plans, budgeting, analytics
- Direct Mail: Acquisition, appeals, acknowledgements, cultivations and emergency alerts
- Email Marketing: Welcome series, appeals, cultivations, e-newsletters, emergency alerts, win-backs, retention communications
- Digital fundraising and engagement: Web site donor conversion strategies, lead generation, social media integration, AdWords management and testing, SEO, multi-channel and omni-channel campaigns
- Other: Mobile Fundraising and Engagement, Peer-to-Peer and Crowdfunding, Gamification, Multimedia, telemarketing, inbound marketing

2 Request for Proposal Timeline and Protocol

2.1 Timeline

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Tender Published</td>
<td>November 01, 2016</td>
</tr>
<tr>
<td>Intent to Participate</td>
<td>November 02, 2016</td>
</tr>
<tr>
<td>RFP Questions Due</td>
<td>November 3rd, 2016</td>
</tr>
<tr>
<td>IMC Response to Questions</td>
<td>November 7th, 2016</td>
</tr>
<tr>
<td>RFP Response Due</td>
<td>November 11th, 2016</td>
</tr>
<tr>
<td>IMC to Complete Shortlisted Vendor Selection</td>
<td>November 30th, 2016</td>
</tr>
<tr>
<td>Meeting with Shortlisted Vendors</td>
<td>December 2016</td>
</tr>
<tr>
<td>Projected Award Date</td>
<td>December 31st, 2016</td>
</tr>
</tbody>
</table>

2.2 Request for Proposal – Instruction

2.2.1 Response Deadline:

- Quotations must be provided no later than 17:00 pm on November 11, 2016. Quotations received after the stated deadline are considered invalid, but exceptions may be made on a case-by-case basis.

2.2.2 Source Selection Criteria:
Evaluation Table
Submissions will be weighted according to the following:

<table>
<thead>
<tr>
<th>Component</th>
<th>Weight (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing</td>
<td>25%</td>
</tr>
<tr>
<td>General Experience (Company Credential, Client, Account Team, etc.)</td>
<td>25%</td>
</tr>
<tr>
<td>Technical Expertise</td>
<td>40%</td>
</tr>
<tr>
<td>Client Reference</td>
<td>10%</td>
</tr>
</tbody>
</table>

2.2.3 Proposal Validity:
- The Proposal should be valid for 120 days from the RFP due date.
- The Proposal includes, but is not limited to cost, pricing, terms and conditions, service levels, and all other information. If your company is awarded the contract, all information in the RFP and negotiation process is contractually binding.

2.2.4 Submission instruction:

a. Proposal must be submitted:
   - Via email to secured email address: Tender.LAX@internationalmedicalcorps.org

You are required to submit signed and dated offers on your company letterhead.

b. To be eligible, Proposal must:
   - Provide full, accurate and complete information as required by this solicitation and its attachments, including any certifications attached.
   - Be submitted on Bidder’s company letterhead and signed by the authorized company officer.
   - It is recommended that the price schedules be copied on Bidder’s letterhead.
   - It is recommended that letterhead includes bidder’s registration number, VAT or fiscal #, address, capital (as applicable), etc.

c. As a minimum, offers must show
   - The RFP reference number;
   - The name, addresses (street, email, other), and telephone number of the Bidder;
   - A detailed technical description/specification of the items being offered in sufficient detail to evaluate compliance with the requirements in the solicitation.
   - “Remit to”/“Submit to” address, if different than mailing address;
   - Past performance information, when included as an evaluation factor, to include recent and relevant contracts for the same or similar items and other references (including contract numbers, points of contact with telephone numbers and other relevant information); and
   - Confirmation of acceptance of Request for Proposal Terms and Conditions.
   - Please refer Sections 5 and 6
2.2.5 Price offer:
- Refer Section 6.9.
- Price offer should meet requirements set in b. and c.

2.2.6 Partial quotation:

Please refer Section 5

2.2.7 Vendor registration:

- All vendors must register with International Medical Corps prior to being awarded a contract.
- If you are not already an International Medical Corps registered vendor, please provide information/documentation as listed on the attached Vendor Registration Form, and confirmation of adherence to International Medical Corps standard Terms and Conditions and Vendor Code of Conduct by returning those documents filled and signed.
- Note that for certain category of supplies, International Medical Corps may require a physical inspection prior to considering your company as registered.

2.2.8 Payment Terms:

International Medical Corps intends to award a contract as a result of this RFP with payment terms being net 30 days from delivery and acceptance of the services.

2.2.9 Invoicing:

Invoices supplied to International Medical Corps should clearly indicate:

- Purchase Order/ Contract/ Work Order number
- All services should be clearly described per line item

2.2.10 Samples:

- When required by the RFP, samples shall be submitted at or prior to the specified closing date.
- Unless otherwise specified in this solicitation, samples shall be delivered with the offer, at no expense to International Medical Corps. Samples will be returned at the sender’s request and expense (within 30 days). The winning bidder’s sample will not be returned and will retained by International Medical Corps.
- Please refer to Section 6.10

2.2.11 Intent to bid confirmation:

- We would appreciate if you could confirm in writing your intent to participate in this tender following receipt of this Request for Proposal and NLT COB on November 02, 2016.

2.2.12 Questions / Clarification requests:

Should you have questions about this Request for proposal, please contact IMC Procurement Representative via e-mail at aalshekhli@InternationalMedicalCorps.org by NLT COB on November 03,
2016. Consolidated list of Questions with respective IMC Answers will be distributed to ALL bidders by NLT COB November 07, 2016.

2.2.13 Collection of Data Files

IMC annual fund donor and gift data files and Google Analytics login can be requested by Bidder from IMC Procurement Representative via e-mail at aalshekhli@InternationalMedicalCorps.org at any time before November 11, 2016 subject of provision of signed Non-Disclosure Form (please refer Annex 1).

3  Company Overview

3.1  Mission

International Medical Corps is a global disaster relief, humanitarian and healthcare training organization.

We are a world-renowned organization with a reputation for being efficient, effective and able to respond in the toughest places on earth during a crisis. For more than 30 years, International Medical Corps has responded to nearly every major man-made or natural disaster around the world—including typhoons, earthquakes, outbreaks of disease, and war. We provide emergency relief to those hit by disaster. We are often first on the ground because we know speed saves lives. We stay during recovery and rebuilding, and we also take the time to train people in affected regions, giving local communities a sense of ownership over their recovery and the ability to shape their future. We teach people to be their own, best First Responders.

We have provided $2.2 billion in program services in 75 countries since our founding in 1984. Our programs priorities include emergency response and preparedness; health services support; family and community health; women and children’s health; water, sanitation and hygiene education and services; mental health and psychosocial support; and nutrition and food security.

To learn more about us, visit https://internationalmedicalcorps.org/

3.2  Current Direct Marketing Program

The current direct response program includes mail acquisition and house appeals, email marketing appeals, cultivations, emergency alerts and e-newsletters and digital marketing via lead generation, paid and organic search strategies and web site-specific campaigns to encourage conversion. We also manage workplace giving, text-to-give and peer-to-peer campaigns.

International Medical Corps operates on a July 1 – June 30 budget year with a cost budget of approximately $450,000. In this budget year, we executed:

- Search Advertising - ongoing
- Planned Giving Cultivation Mailing
- August Sustainer Acquisition Campaign – email, online
- Lead Generation Campaign
- September Email Appeals, Cultivation and Enews
- September Mail Appeal
- September Mail Acquisition
• October Email Appeals, Cultivation and Enews
• October Appeal
• Hurricane Matthew Emergency Response – Urgentgram, Emails, Paid search, remarketing
• November Lead Generation Campaign

Scheduled:
• Year End Appeal (DM, Emails and Landing Page)
• Holiday Card appeal
• January renew your support appeals (mail, email)
• January Mail Acquisition
• March Appeal – mail, email
• Mother’s Day
• Fiscal Year End (DM, Emails and Landing Page)

3.3 Challenge and Vision
International Medical Corps is known as a nimble organization that is able to adapt quickly to take advantage of opportunities in the field. We expect no less in our direct response program, and seek a partner who can help us take advantage of opportunities when they arise. We seek to be a leader in implementing proven digital strategies and in testing new online marketing strategies, and are looking for a partner with demonstrated success in this area. As our donor base grows, we want to speak to our audiences where they are, with tailored messaging that is personalized for them.

The long-term goals for the direct response program are to grow a healthy donor file that provides a consistent pool of unrestricted funding, and to a lesser extent, restricted funding. Because we are known as a First Responder, International Medical Corps struggles to grow its unrestricted donor base. A healthy file will drive new, unrestricted revenue and will include a robust monthly giving group, strong mid-level donor and upgrade programs, strong retention efforts and will provide a pipeline to the major gift program. In broader terms, this program should support the efforts of the private funding team to increase awareness and understanding of the International Medical Corps brand and persuade supporters to make an investment in our organization, in addition to our emergency relief work.

Our challenge is to achieve our ambitious goals within an established not-to-exceed ceiling of this procurement as 450,000/fiscal year. Our current gross revenue target is $1.2 million, but would grow as we grow the donor file.

3.4 Internal Staff
• Sr. Resource Development Officer – primary point of contact
• VP, Institutional Advancement
• Graphic Design Lead and team
• Sr. Digital Communication Specialist and team
• Manager, Resource Development, Data & Operations and team
• Operations: Resource Development Department includes a 6-member Data and Operations Team supporting all fundraising channels. Checks are processed in-house 3-5 times a week depending
on volume. Monthly charges are done automatically through Engaging Networks, and follow-up are conducted by Operation team. Donation acknowledgments and receipts are also done by Operations team, through working closely with CEO and major donor team on high-touch donor customization. Specifically with direct marketing firm, the Operations team supports data exchange, mailing and email lists, production support, invoice processing, and project management of backend system needs such Engaging Networks.

3.5 System

Below are software we use for direct marketing:

- CRM: Raiser’s Edge (system of record)
- Donation Page and Mass Email: Engaging Networks
- CMS: WordPress (currently migrating to)
- Text: MobileCause

3.6 Donor File Summary

- Our direct marketing house file can be broken into 5 different categories:
  - Current Donors – These donors were acquired through many channels (online, events, direct mail) as unrestricted donors. These donors may have given to one emergency, but more than likely have given through other campaigns and efforts.
  - Multi Emergency Donors – Donors who have given to more than one emergency, but haven’t given any unrestricted gifts. A majority of these donors were acquired online. These donors have not activated to the file since the last emergency, the East Africa Famine in 2011.
  - Single Emergency Donors – Donors who gave to one single emergency (Haiti, Japan, East Africa), but have never given again. A majority of these donors were acquired online. Most of them have not donated in the last 24 months.
  - Lapsed Donors – Donors who have donated unrestricted gifts and were acquired through many channels (online, events, direct mail), but haven’t activated to the file in 24+ months.
  - Warm prospects- Potential donors who have been acquired through many channels including online acquisition programs like Change.org and Care2 who have never made a donation to the organization but have expressed interest.

- 175,000 database records (<$5000), which contains
  - 300 monthly recurring donors
  - 32,000 single or multi emergency only donors
  - 31,000 non-emergency donors, including 10,000 current donors (0-24 months) and 21,000 lapsed donors (25+ months)
  - 110,000 warm prospects

- 150,000 emails
- 1,200 $5000+ donors;
- 1,800 major donors managed by portfolio officers
• Roughly 90% of our supporter file is domestic, however, during emergencies, we tend to receive a higher percentage of international gifts driven by the location of the disaster. For example, 36% of gifts to the 2015 Nepal earthquake were international.
• During emergencies, 70% of online gifts are received within the first week of an emergency, and 90% of offline gifts are received within the first five weeks of an emergency.
• Standard donor profile
  o Single or Multi Emergency Only Donor: 50 year-old, either married or single female earning $85K, no children at home, high school or college educated professional with a net worth of $175K
  o Current Donor: 55 year-old female either married or single earning $100K, no children at home, high school or college educated professional with a net worth of $175K
  o Major Donor: 50 year-old married male or female earning $150K+, no children at home, college educated professional with a net worth of $750K

4 Scope of Work

The firm we engage will provide some or all of the following services:

• Overall Direct Marketing Strategy: file growth, revenue growth, retention, increased ROI, emergency donor conversion, sustainer conversion, testing plans, budgeting, analytics
• Direct Mail: Acquisition, appeals, acknowledgements, cultivations and emergency alerts
• Email Marketing: Welcome series, appeals, cultivations, e-newsletters, emergency alerts, win-backs, retention communications
• Digital fundraising and engagement: Web site donor conversion strategies, lead generation, social media integration, AdWords management and testing, SEO, multi-channel and omni-channel campaigns
• Other: Mobile Fundraising and Engagement, Peer-to-Peer and Crowdfunding, Gamification, Multimedia, telemarketing, inbound marketing

5 Proposal Submittal

Proposals should include, but are not limited to, explaining in detail the vendor’s proposed processes for working with International Medical Corps’ team to:

• formulate marketing and channel strategies
• develop and execute fundraising plans on time and on budget
• design and execute creative
• develop and manage yearly schedules of activities
• assess process and programs
• report results and refine strategies based on data

A firm may bid on digital services only, mail services only or both. For mail, see section one, for digital, see section two.
You will have access to our annual fund donor data. We have described our current program in detail. In your proposal, please outline your recommendations for the International Medical Corps direct response program and describe, overall, how a partnership with you will help us overcome our challenges and meet our goals.

6 Proposal Narrative - Please address the following in your proposal:

6.1 General Company Info
- Please provide the name and contact information for your company.
- Primary point of contact
- Office location(s)
- Size by staff
- Current client list (to identify potential conflicts with your assignment)
- Examples of past/current clients for whom you have done similar work
- How many years has your company been in business?

6.2 Administration
- Describe Data Security, Transfer and Storage
- Describe List Management
- Describe invoicing process
- Do you provide pass-through payment for printing and production costs?
- Do you mark-up pass through costs?
- Are you registered to solicit in US?
- Are you registered to solicit anywhere else?
- Are you able to support our time zones – EST, PST
- Do you abide by the AFP Code of Ethics: https://www.afpnet.org/files/ContentDocuments/CodeofEthics.pdf
- Account Management
- Describe what an agency/client relationship would look like. What is a typical team?
- Bios of key personnel

6.3 Strategy and Budgeting
- Explain your process for creating a typical budget and direct response strategy for your clients.
- Do you have experience with emergency donor conversion?
- Do you have experience with sustainer conversion?
- What are key indicators you use to determine the health of a direct response program?
- Do you have experience creating test plans and reporting results?
- How important are best practices and industry standards?

6.4 Marketing Campaigns – Mail (Section One)
- Describe the typical strategic planning process for mail campaigns
- What is your creative capacity for mail packages?
- Do you manage production, including bidding out to mail shops?
- What is your experience modeling names?
• What is your expertise in mail campaigns?

6.5 Marketing Campaigns – Digital – (Section Two)

6.5.1 Email
• Describe the typical strategic planning process for email campaigns
• What is your creative capacity for email?
• What is your development capacity for email coding?
• What is your plan to maintain good deliverability?
• What experience do you have with marketing automation?

6.5.2 Digital Marketing Strategy
• Describe your experience with Google Tools – analytics, AdWord, Google Grants
• Explain how you would use the organizational web site as a tool for fundraising and lead generation
• Explain how you would use other digital platforms as a tool for fundraising and lead generation
• Describe a healthy digital marketing program. It should, at minimum, include______

6.6 Data and Reporting
• Describe your reporting capabilities. What reports would you deliver and how often?
• How do you work with us to use stats to drive smart decisions? What’s your expectation of our participation?
• Please briefly describe your LTV methodology.
• How do you measure the ROI of online investments? Please briefly describe related tracking mechanism you would need to implement.
• Can you provide benchmarking information?
• Please describe data points you would need during onboarding

6.7 Emergency Response
Indicate whether or not you are able to mobilize in tandem with internal team and be ready to execute emergency response plan within 2 hours of notification, which includes:

• Email
• Urgentgram
• Paid search
• Social posts
• Remarketing
• Telemarketing – (future)

If you have experience with emergency response, please describe.

6.8 Other
• Describe your experience and/or capabilities in peer-to-peer fundraising, workplace giving, mobile giving and any other giving channels.
6.9 Budget
This proposal must include a budget for all aspects of the work, including those that will be performed by subcontractors, and the firm must accept accountability and final responsibility for the quality and timeliness of everything done by the subcontractors. The not-to-exceed ceiling for subject procurement is established as $450,000 in expense/fiscal year including retainers. (If you are submitting a bid for digital services only, not-to-exceed ceiling is established as $165,000/fiscal year including retainers.) Any submissions that propose yearly expenses above this amount will not be considered. A firm may bid on digital services only, mail services only or both.

Costs to include:

- Retainer – Itemize everything that is included or explain your cost structure if not retainer-based – separate your costs by mail (offline) and online services.
- Any costs not included in retainer
- Provide a sample annual direct marketing plan and budget for International Medical Corps, outlining typical or average creative, production, development and printing costs

6.10 Samples and Attachments:

- Please provide an example of a campaign report
- Please provide an example of an in-depth analysis, and how it drives decision making.
- Provide 2 samples of email campaigns and results
- Provide one acquisition mail appeal
- Provide one house mail appeal
- Provide one case study of a digital campaign including creative and results
- Provide 3 client references

7 QA/QC
IMC is not responsible for any costs associated to defective services provided by the Contractor. Any costs related to corrective measures are sole responsibility of the Contractor. Any delivered services are subject of IMC formal acceptance.

8 Request for Proposal - Terms and Conditions:

Issuance of this RFP does not constitute an award commitment on the part of the International Medical Corps, nor does it commit International Medical Corps to pay for costs incurred in the preparation and submission of a bid.

Attached files are integral part of this RFP including Terms and Conditions Version June 2016.

By submitting the valid offer to this RFP you accept to adhere to RFP and Terms and Conditions.
International Medical Corps may contact bidders to confirm contact person, address, bid amount and to confirm that the bid was submitted for this solicitation.

**False Statements in the Bid:**

Bidders must provide full, accurate and complete information as required by this solicitation and its attachments. False statements in bids constitutes grounds for immediate termination of the agreement with vendor. International Medical Corps takes fraud, misstatements, falsification, manipulation, alteration of facts and/or documents very seriously and has a zero tolerance policy and may choose to take legal action in case of misrepresented disclosures by Contractors.

**Conflict of Interest Disclosure:**

Bidders must provide disclosure of any past, present or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in International Medical Corps having to re-evaluate the selection of a potential Bidder.

**Right to Select/Reject**

International Medical Corps reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. International Medical Corps also reserves the right to reject any or all proposals received without explanation.

**Reserved Rights:**

All RFP responses become the property of International Medical Corps and International Medical Corps reserves the right in its sole discretion to:

- To disqualify any offer based on Bidder’s failure to follow solicitation instructions;
- To waive any deviations by Bidder from the requirements of this solicitation that in International Medical Corps’ opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition;
- Extend the time for submission of all RFP responses after notification to all Bidders;
- Terminate or modify the RFP process at any time and re-issue the RFP to whomever International Medical Corps deems appropriate;
- Issue an award based on the initial evaluation of offers without discussion;
- Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.
**Code of Conduct**
International Medical Corps is committed to upholding the highest standards in all our business dealings with the U.S. Government and other international and private funders, protecting taxpayer resources, and providing high-quality services and products. Complying with all laws and regulations and ensuring fair competition are fundamental to this commitment. As such, International Medical Corps’ vendors shall allow International Medical Corps to audit their compliance programs.

The Vendor Code of Conduct expresses the expectations we hold for all of International Medical Corps’ vendors and they are required to sign and submit the attached Vendor Code of Conduct.

**Reporting of Fraud & Unethical Behavior:**
To report fraud and unethical behavior:

- File a report online at [EthicsPoint](https://secure.ethicspoint.com/domain/media/en/gui/29929/index.html) or
- Contact report@internationalmedicalcorps.org for further instruction.
- Reports may also be made to compliance@internationalmedicalcorps.org or
- legal@internationalmedicalcorps.org

More details on International Medical Corps and our projects worldwide are available through our web site: [www.internationalmedicalcorps.org](http://www.internationalmedicalcorps.org)

Anmar Alshekli

Procurement Officer

International Medical Corps

aalshekli@InternationalMedicalCorps.org