Request for Proposal - RFP

Dear Sir or Madam,

Catholic Relief Services (CRS) is issuing a Request for Proposals (RFP) for Digital Advertising Services vendors under a three-year contract. The attached RFP contains all the necessary information for interested bidders.

Companies or organizations may indicate their interest in submitting a proposal for the anticipated contract by sending an email indicating their intention to Catholic Relief Services, Attn: Chris Stanley, 228 W. Lexington St., Baltimore, MD 21201 USA by April 25, 2022, reference RFP No. US4300.

CRS realizes that Bidders may have additional questions after reading this RFP. Interested Bidders can submit their questions to chris.stanley@crs.org according to the instructions in the RFP.

This RFP does not obligate CRS to execute a contract, nor does it commit CRS to pay any costs incurred in the preparation and submission of the proposals. Furthermore, CRS reserves the right to reject all offers, if such an action is in the best interest of CRS.

Sincerely,

Chris Stanley
Request for Proposals

RFP No. US4300
for
Digital Advertising Services

Contracting Entity: Catholic Relief Services (CRS)
228 W. Lexington St.
Baltimore, MD 21201 USA
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**Section I. General Information**

**Introduction & Purpose**

Catholic Relief Services (CRS), an international not-for-profit non-governmental organization founded in 1943 by the Catholic Bishops of the United States to serve World War II survivors in Europe. Today, it is the official international humanitarian agency of the U.S. Catholic community. It provides support to impoverished and disadvantaged people in over 100 countries overseas based solely on need, regardless of their race, religion, or ethnicity. Within the United States, CRS engages Catholics to live their faith in solidarity with the poor and suffering of the world. CRS works with individuals, dioceses, parishes, schools, and organizations throughout the United States to offer Catholics at home concrete ways to contribute to the progress of the world by helping the poorest and most vulnerable overseas.

The intent of this Request for Proposals (“RFP” or “Solicitation”) is to provide Digital Advertising Services vendors an opportunity to present their qualifications, experience, and conceptual approach to providing the scope of services in relation to the needs of CRS for our headquarters office located in Baltimore, Maryland USA.

CRS is seeking a vendor to help us increase donors and raise revenue by delivering solutions to promote direct response fundraising in the digital space, while also expanding website traffic and drive lead generation for Catholic Relief Services in fiscal year 2023 to fiscal year 2025 (October 1, 2022, to September 30, 2025).

Vendor will work closely with CRS’s digital fundraising staff under the guidance of the CRS Digital and Hispanic Development team as described below with a mutual objective to identify qualified audiences to donate through digital channels and simultaneously increase website traffic and brand recognition. These efforts are intended to utilize display, search, and other online channels as viable, sustainable fundraising channels contributing to organizational growth, with ad campaigns in both English and Spanish.
1.1 Scope of Work

Monthly performance reports will be sent around the 10th of each month after the last day of the prior month’s closing.

I. Strategic Planning

Provide recommendations for new initiatives and campaigns, as well as improvements to existing initiatives and campaigns, on an ongoing basis. These recommendations will address all paid media including display advertising, search (paid and Grant), all paid social channels, and any incentivized or lead generation initiatives employed. These efforts must culminate in new donors, more dollars, and qualified donor prospects. Furthermore, our strategic plan is to acquire younger donors (under 65) and grow our Hispanic donor audience. The vendor will provide additional strategies and techniques to assist with these goals.

Deliverables:

- Conduct strategic planning based on industry best practices, experience with other clients, intellectual capital, previous campaign analytics, and CRS stakeholders and partners.
- Produce campaign marketing plan outlining key components and recommendations for each proposed campaign (depending on campaign complexity).
- Plan strategy with CRS around campaign for messaging, theme, tone, creative recommendations, audience selections, landing page recommendations and media channels employed.
- Provide ongoing updates around changes in the digital sphere and adjust strategy, accordingly, testing new campaigns and channels.

II. Media Buying and Campaign Managing

Manage all aspects of media buying and campaign management for display, search (including Grant), incentivized programs, Native, lead generation, peer to peer texting, and fundraising through paid social. As technology births new digital platforms, we may decide to add to this list, which is not exhaustive.

Deliverables:

- Display advertising may be conducted via programmatic buying or direct placements and includes prospecting and retargeting efforts utilizing static, animated or video assets.
- Develop, implement, and manage a search structure to optimize paid search in conjunction with the Google Grant. Propose ad groups, keywords, and copy for all search campaigns.
Develop and manage paid social media campaigns for social channels for viable fundraising, traffic generating, audience engagement, or lead generation opportunities.
- Develop and manage peer to peer text campaigns throughout the year.
- Contract and manage incentivized programs and lead generation campaigns.

III. **Data Onboarding**

Using data provided by CRS and potential partners, conduct media buying. Load data into each platform on a quarterly basis to enhance marketing performance.

IV. **Landing Page and Site Optimization Consultation**

For each campaign, recommend landing page content with the goal of optimizing donor conversion or other agreed outcomes. Advise on homepage and other site content for maximization of fundraising objectives, including any potential improvements to SEO or other items.

V. **Creative Design**

Provide copy for keywords, display ads, paid social ads, peer to peer text scripts, and other channels. Provide design work and review for display ads.

VI. **Analytics, Reporting and Account Management Services**

Provide a high-level of expertise and service throughout contract, including analytics on campaigns and a/b testing, reports, quarterly business reviews, and weekly meetings to discuss future campaigns and current campaign performances.

VII. **Budgeting**

Provide an annual budget in advance of the start of each fiscal year, based on CRS’ guidance, performance objectives, and cost thresholds. This will cover all paid digital fundraising channels and management of them, giving both actual and projected tracking.

VIII. **Additional Capabilities**

Vendor should present any additional capabilities they possess that are aimed at optimizing donor behavior and retention, especially with the specificity of the CRS donor in mind. Examples may include other ways (not listed above) to elicit donor preferences related to communication cadence, creativity, etc.
Because CRS is a relief and development agency, an available vendor is needed for natural disasters that may happen on the weekend or holiday. Vendor should be available on call for emergency fundraising and quick response for paid ad creation and management.

- Timely response to requests and changes as needed.
- Spanish-speaker and/or knowledge of U.S. Hispanic audience.
- Understanding of the U.S. Catholic audience.

It is intended that one (1) contract will result from this Solicitation. Any Contract arising from this RFP action shall commence on the date the Contract is executed on behalf of CRS, or such other date as CRS and the Contractor shall agree. The initial term of the Contract is anticipated to start on October 1, 2022, through September 30, 2025. There will be a three (3) year duration with a CRS option to renew for two (2) years.

Questions must be submitted in writing via email and reference RFP No. US4300. Questions are due by May 2, 2022. Copies of replies will be sent to all other Offerors, but without identification of the inquirer. All such questions and inquiries must be received by the date and time as outlined. Late proposal submissions will not be accepted. The time on the “sent” email from the Proposer will be used to determine timeliness.

1.2 Offer Deadline

The deadline for receiving proposals is May 27, 2022, 11:59 pm EDT. Bidders shall submit their proposals by email only to Chris Stanley.

Email address:  chris.stanley@crs.org

Email headers must include RFP reference number: US4300.

Bidders are responsible for ensuring that their offers are received in accordance with the instructions stated herein. Late offers may not be considered.

1.3 Bidding Cost

Bidders are solely responsible to carefully examine all provisions of this RFP. Failure to do so will be at the bidder’s sole risk and expense. Any patent ambiguities or inconsistencies in the RFP will be resolved against a bidder if it fails to seek clarification of the same prior to award.

1.4 Submission of Offers

Separate technical and financial proposals must be submitted by email no later than the time and date specified in §1.1.2. The proposals must be submitted to the point of contact designated in §1.1.2.
The Bidder must submit the proposal electronically compatible with Adobe Portable Document Format (PDF) and MS Excel format in a Microsoft XP environment. Bidders must not submit zipped files. Those pages requiring original manual signatures should be scanned and sent in PDF format as an email attachment. All bids must be in the English language. Proposals must follow the numerical order of requirements as presented within this RFP. Individual sections must be identified with the corresponding numbers and headings used herein. Responses must also include a corresponding table of contents.

Bids may not be altered, corrected, supplemented, or withdrawn after the Last Bid Receipt Date, except that CRS, at its sole discretion, may permit correction of arithmetic errors, transposition errors, or other clerical or minor mistakes. Other than the mistakes listed in the previous sentence, no mistakes alleged by a bidder after the Last Bid Receipt Date will be permitted to be corrected. Nevertheless, if deemed necessary, CRS may ask, in writing, a bidder for clarification or explanation.

1.5 General Requirements

CRS anticipates entering a contract with the successful bidder which can supply Digital Advertising Services to our Baltimore, Maryland USA office by September 1, 2022.

CRS may elect to hold vendor demonstrations.

The Bidder must verify that it does not appear on:

1) The website of the System for Award Management (SAM) formally known as the Excluded Party List System (EPLS): https://www.sam.gov;


1.6 Conflict of Interest, Anti-bribery, and Anti-Corruption Statement

Our CRS values and guiding principles commit us to avoid conflict of interest, and to never accept any form of fraud or corruption in compliance with operational regulations.

It is the policy of CRS that no vendor shall take any action or make any statement intended to influence the action of a CRS employee, to benefit the personal interest of the employee or the employee’s family members, rather than the interest of the agency.
CRS employees shall not solicit, request, accept, or agree to accept any significant gift from a CRS partner or prospective partner. A significant gift is defined as any tangible item, service, favor, credit, or discount of value, not available to others, which could influence decisions and actions. No monies are to be accepted as a personal gift for any reason whatsoever.

1.7 Source of Funding

Any contract resulting from this RFP will be financed by CRS’ own resources, foundations, and other sources.

1.8 Chronological List of Proposal Events

The following calendar summarizes important dates in the solicitation process. Bidders must strictly follow these deadlines.

RFP published April 13, 2022

Intention to bid April 25, 2022

Deadline for written questions May 2, 2022

Question responses May 9, 2022

Proposal due date May 27, 2022

Contract award (estimated) August 2022

The dates above may be modified at the sole discretion of CRS. Any changes will be published in an amendment to this RFP.

1.9 Validity Period

Bidders’ proposals must remain valid for ninety (90) calendar days after the proposal deadline.

1.10 Negotiations

CRS reserves the right to conduct post-iterative negotiations. If deemed an opportunity, CRS reserves the right to make separate awards per component or to make no award at all.
1.11 Amendments

If at any time prior to award, CRS determines there to be a need for a significant modification of the provisions of the RFP, CRS will issue a written amendment to all potential suppliers. No oral statement of any person shall, in any manner, be deemed to alter or otherwise affect any term or condition of this solicitation, and no supplier shall rely on any such statement.

1.12 Rejection or Award

CRS reserves the right to reject any and/or all proposals for any reason. CRS also reserves the right to accept any tender in whole or in part and to contract on any of the terms offered or on different terms.

Upon award and execution of a contract under the RFP, CRS will notify unsuccessful bidders. CRS will not be bound by any award notice issued under this RFP until a contract is duly signed and executed with a bidder.

1.13 Protest

Bidders agree that any protest to this request for proposals must be presented in writing with a full explanation of the Bidders’ concerns to CRS for consideration. At its sole discretion, CRS will make a final decision on the protest.

1.14 Confidentiality

The contents within this document are considered confidential and should be shared with relevant members of your team (staff, consultants or advisors) on a need-to-know basis. Bidders are responsible for any breaches originating from their Team.

Information relating to the examination, evaluation, and comparison of Bids, and the recommendation of contract award, shall not be disclosed to Bidders or any other persons not officially concerned with such process, even after publication of the contract award.

1.15 Evaluation and Basis for Award

A contract will be executed with the Bidder whose proposal is determined to be responsive to this solicitation document, meets the eligibility criteria stated in this RFP, which is determined to represent the best value to CRS.

Specify length, start date, and end date of the contract, and the options for renewal.

All proposals submitted in response to this RFP will be evaluated by CRS/Global Supply Chain Management (GSCM) personnel. GSCM will judge the merit of proposals received in accordance with the evaluation criteria described below.
The evaluation will be a five-stage process consisting of:

1. Ability to Meet Scope of Work
2. Price and Support
3. Service
4. Skill Level and Industry Knowledge
5. Creative and Strategic Talent
## PROPOSAL RANKING SHEET

### EVALUATION CRITERIA

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Maximum Points</th>
<th>Score</th>
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<tbody>
<tr>
<td>1. Ability to Meet Scope of Work:</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>Evaluate the Bidder’s response to requested Scope of Work. Consider the capacity to provide digital advertising services and meet deliverables.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Price and Support:</td>
<td>15</td>
<td></td>
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<tr>
<td>Evaluate the Bidder’s cost proposal for purchase of digital advertising services, as well as for the ongoing customer support costs.</td>
<td></td>
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<tr>
<td>3. Service:</td>
<td>15</td>
<td></td>
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<tr>
<td>Evaluate the Bidder’s guarantee of service timing, as well as qualification of the service representative(s) assigned to CRS.</td>
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<tr>
<td>4. Skill Level and Industry Knowledge:</td>
<td>15</td>
<td></td>
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<tr>
<td>Evaluate how Bidder can generate traffic and leads and reach a target audience.</td>
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<tr>
<td>5. Creative and Strategic Talent:</td>
<td>15</td>
<td></td>
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<tr>
<td>Evaluate the Bidder’s ability to craft creative solutions designed for CRS’ needs.</td>
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**TOTAL POINTS**  
100

Ranked By: ____________________________
Section II: Required Proposal Documents & Technical Proposal

2.0 Supplier Questionnaire

In addition to the information requested in the Supplier Questionnaire (Annex 1) please include the following documents in your submission:

- Cover Letter
- Executive Summary
- Company Overview
- Proposal with reference to RFP No. US4300
- Summary of non-profit sector experience
- Client list
- References

2.1 Cover Letter

Limit the cover letter to two pages or less. Specify the vendor’s primary point of contact.

2.2 Executive Summary

Succinctly outline the proposed solution. Introduce the differentiating elements of your Digital Advertising Services proposal. Limit the Executive Summary to two pages or less.

2.3 Company Overview

- Provide a general description of the company, a statement regarding stability, and an overview of the organizational structure.
- Describe the company resources dedicated to development, enhancement, management, and support of digital advertising services.
- List recent awards and other indicators of industry leadership.
- Do you have a product roadmap? What features and functions are in your organization’s roadmap?
- Do you have an application strategy with readily available apps? What apps do you have available today benefiting customers?
- Describe the organization’s expertise in this market.
- Provide a list of recently completed projects or implementations, preferably in the same or similar industry.

Catholic Relief Services reserves the right to contact the references listed and, if necessary, request additional references from respondents.
2.4 Technical Proposal
Detailed and comprehensive submission of services provided in response to the Scope of Work. The proposal shall reflect how the Bidder will strategize to bring the desired outcome.

2.5 Financial Proposal
Includes precise listing of Bidder’s costs in response to the Scope of Work. Include price table listing down all the services CRS might require.

2.6 Summary of Non-profit Sector Experience
The bidder must include a summary of experience providing Digital Advertising Services for non-profit organizations. Summary shall not exceed one page in length.

2.7 Client List
Bidders must submit a list of at least three (3) former or current clients for whom the Bidder has performed similar or like services to those being proposed, within the past three years.

2.8 References
Bidder must submit a list of at least three (3) references. Include the name and contact information of all persons or business entities, whether past or present, to which you've provided Digital Advertising Services within the past three years.
Section III. Annexes

Annex 1 – Supplier Code of Conduct: The Supplier or Service Provider agrees to adhere to the requirements laid out in the Supplier and Service Provider Code of Conduct. [https://www.crs.org/sites/default/files/supplier_code_of_conduct.pdf](https://www.crs.org/sites/default/files/supplier_code_of_conduct.pdf)

Annex 2 – CRS Terms & Conditions: Catholic Relief Services’ Standard Terms and Conditions can be found at [http://crs.org/vendor-terms/vendor-terms.pdf](http://crs.org/vendor-terms/vendor-terms.pdf), or obtained from CRS upon request, and are binding as applicable under local law.