



# Invitation

# To Tender

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## 1. Background Information on Plan International

Plan International is an independent development and humanitarian organisation that advances children's rights and equality for girls.

We believe in the power and potential of every child, but this is often suppressed by poverty, violence, exclusion and discrimination, and its girls who are most affected. Working together with children, young people, our supporters and partners, we strive for a just world, tackling the root causes of the challenges facing girls and all vulnerable children.

We support children's rights from birth until they reach adulthood, and we enable children to prepare for – and respond to – crises and adversity. We drive changes in practice and policy at local, national and global levels using our reach, experience and knowledge.

We have been building powerful partnerships for children for over 85 years and are now active in more than 75 countries.

Read more about Plan International's Global Strategy: **Girls Standing Strong** at <https://plan-international.org/strategy>

### Background to this Assignment

As the world continues to change, it is clear we need to reframe how we think about and implement our sponsorship work, so that we can be in the best possible position to achieve our ambition to reach 200 million girls. That is where the Next Gen Programme comes in. This initiative is to keep the best of what we have by strengthening the one-to-one model; while accelerating community sponsorship; scaling existing and proven models and, which is the main focus in this assignment, prototyping new private giving options. Modernizing will help us explore new avenues for fundraising, make processes more efficient, and create more impact for girls and young people worldwide.

Next Gen will reimagine how we market and fund our programs; and ensure they remain effective and efficient at a community level. These global efforts to strengthen and modernize our private giving portfolio are aligned with National Offices (Nos) and Country Offices (Cos) with the intention to stabilize income and have greater impact in the communities we work with.

### Identified problem

Over several years, the 1:1 Sponsorship model has shown flat or no growth. Expected annual cancellations and an aging donor population put us at risk of seeing a donor decline in the coming years, at the same time as there has been a significant shift in donor behavior and expectations. To address these challenges, Plan needs to diversify our individual giving offers to meet the needs of our donors, widening our donor base through new target audiences and adding complementary source of flexible income.

### Identified solution

We will focus on building a future-proofed individual giving portfolio with concepts that complement each other and serve as a flexible funding stream, enabling Plan to diversify our donor base and target audiences with propositions that cater to changing donor behavior, preferences, and needs.

## Overall project goal and purpose of consultancy

- The project's objective is to drive identification and development around new private fundraising option with the stickiness, predictability and revenue potential that caters to donor needs and preferences, reflects and strengthens Plan International brand, and drives flexible income.
- The primary purpose of this consultancy work is to gain professional assistance in the framing of scope, consolidation of necessary insights that will inform strategic approach, concept ideation and development, testing approach to ensure relevance and success as well as roll out in markets.

## Intended results

- The development and creation of a new global fundraising concept (product) that can be rolled out and successfully promoted across all Plan International's local fundraising markets.
- The fundraising option is meant to attract, inspire, inform, engage and ignite action and donations among our target audiences by standing out from the crowded fundraising marketplace.
- The fundraising concept should be purposefully built to engage, attract and convert a broader international target audience, ensuring stable flow of flexible income.
- The concept should be rigorously tested and refined to ensure its relevance and accuracy as a fundraising product, taking into account the changing fundraising landscape and trends, donor needs, barriers and drivers, cutting edge fundraising strategies and techniques, foster transparency and authenticity as well as adhering to global brand guidelines and editorial brand.
- The first and most important KPI of the new alternative fundraising option is increasing unrestricted fundraising revenue.

## 2. Requirement

This project will be a holistic end-to-end development of a new global private fundraising option that can be rolled out across our fundraising markets. We will utilize experience and learnings from previous and current fundraising innovation initiatives, as well as tap into donor behavior, needs and preferences as well as opportunities in the shifting fundraising landscape.

This project will include the ideation, creation, production, testing and refinement of a new fundraising option that will play a vital role in future-proofing Plan International's individual giving portfolio.

Our selected agency will:

- Work together with stakeholders across Plan to identify and develop a relevant and attractive fundraising product offer and test it in local markets.

- Leverage current fundraising innovation pilots on local and global level, learn from previous experience and tap into donor behavior and shifts in fundraising landscape to create a relevant and forward-facing concept.
- Create a hands-on Playbook that can be adopted by local fundraising entities including product proposition, donor journeys, content- and marketing strategies and roll out guidelines.
- Create a testing plan for data-driven insights and product refinement.
- Refine and improve the concept based on testing and feedback from audiences to ensure relevance and efficiency.
- Align concept with global and editorial brand requirements.
- Support in developing a measurement process to capture progress across local fundraising entities.
- Support in the development of a supporting marketing campaign and associated materials.

Ultimate project success will be the development of global concept adopted and rolled out by local offices in their markets.

### **Project time period**

The project is estimated to be started during Spring 2025 and completed in 2026.

### **Indicative timeline:**

- Framing and scoping of assignment and approach finalized in April 2025.
- Plan-wide consultation wrapped up June 2025.
- Category external landscape review do be conducted by Q4 FY25.
- Target audience research conducted and insights shared by end of July 2025.
- Development and design of new MVP concept ready to be rolled out November 2025.
- MVP concept piloted first three months of 2026.
- Concept refinement and phase 2 piloting to be finalized by June 2026

### **Target audience**

Target audience discovery and creation will be a part of our product development and we will explore motivations, pain points, barriers, and other interests of our target audience in this process.

### **Project Deliverables:**

The project deliverables will be defined together with agency partner based on the assignment and requirements. All final materials should be shared in a format in which can be edited as needed.

## **3. Expected qualifications of Consultant**

- Proven experience carrying out similar briefs for INGOs and a deep understanding for the sector and the challenges we are facing.

- Proficient in leading concept development from start to finish including all phases from exploration and scoping, development, refinement, production, socialization, roll out and testing.
- Cutting edge skills in fundraising and prototyping development.
- Proficient in creating fundraising and communication content that reflects the strategic approach and adhere to target audience needs.
- Data analysis skills to explore and understand insights to inform strategic choices and refinement strategy.
- Ability to professionally and sensitively work with donor segments to test and improve conceptualization based on feedback.
- Competent project and account managers.
- Knowledgeable in anti-racist and anti-colonial approaches and methodologies.

## 4. ITT Overview and Instructions

### 4.1 Overview

Plan International are inviting interested parties to submit a Proposal as part of a competitive process for the provision of consultancy services. Successful Bidder(s) will be expected to enter into a formal contract with our organization. Plan International reserves the right not to award a contract as a result of this Invitation to Tender, or to award to multiple successful Bidders.

### 4.2 Instructions to Tenderers

These instructions are designed to ensure that all Bidders are given equal and fair consideration. It is the Bidders responsibility to ensure their offer is complete and that you provide all the necessary information asked for in the format specified, or risk your offer being rejected. Further details can be found in section 9.1 of this ITT document, '**Submission Checklist.**'

**Women-owned businesses and companies actively engaged or advancing gender equality and women empowerment in the workplace are especially encouraged to apply.**

Documents comprising this tender pack are as follows:

- ITT FY25-198 Next Gen New Alternative Fundraising Option
- ANNEX A – Supplier Questionnaire
- ANNEX B - Non Staff Code of Conduct

Tenderers are required to submit their proposal, inclusive of all required annexes, via email to [procurement@plan-international.org](mailto:procurement@plan-international.org). Offers must be received by the deadline specified in the section '**3.3 Key Dates and Timelines.**'

The offer and all correspondence and documents related to the tender must be written in English Language

**Each Tenderer or member of consortium or sub-contractor may submit only one offer.**

Unless stated otherwise, all communications from Bidders in relation to this tender, including Clarification Questions, must be directed to [procurement@plan-international.org](mailto:procurement@plan-international.org) must include the ITT reference number: ***ITT FY25-198 Next Gen New Alternative Fundraising Option***

### 4.3 Key Dates and Timelines

The following table outlines the key dates and timelines associated with this tender process. Plan International reserves the right to change these at any time as the tender progresses. To maintain transparency, fairness, and adequate time to prepare your offers, Plan International will inform all interested Parties of any changes to these key dates and timelines simultaneously and in a timely fashion.

Activity	Deadline Date
Issue of Invitation to Tender	<b>28<sup>th</sup> February, 2025</b>
Deadline for supplier submission of clarifications questions	<b>4<sup>th</sup> March 2025</b>
Deadline for Plan to respond to clarification questions	<b>5<sup>th</sup> March 2025</b>
Deadline for submission of offers	<b>21<sup>st</sup> March 2025</b>
Plan Review of Offers	<b>24<sup>th</sup> – 26<sup>th</sup> March 2025</b>
Supplier short-list notification	<b>26<sup>th</sup> March 2025</b>
Supplier presentations / interviews	<b>27<sup>th</sup> – 28<sup>th</sup> March 2025</b>
Contract Award	<b>31<sup>st</sup> March 2025</b>

### 4.4 Pricing

All rates/prices must be quoted in GBP for UK-based consultants or USD/EUR for any consultants based outside of the UK, and exclusive of Value Added Tax (VAT)

It is expected that prices will be fixed for the duration of the contract and quotes valid for a maximum period of 90 calendar days following the Closing Date of this tender. If for any reason you are unable to guarantee fixed pricing for the duration of the contract, any projected price increases should be clearly stated in your tender.

To ensure a fair and transparent process, Plan International will not be able to divulge budget information relating to this tender or associated Projects. It is expected that Bidders submit their best possible financial offer at the point of submission.

The successful Bidder will be required to pay their staff who work on this contract **at least** the National Living Wage.

## 5. Selection Criteria

Bids will be assessed against predetermined criteria which has been developed and agreed by the Tender Panel prior to launching this Tender process. The information gathered in the proposals and any other requested documentation, will be used to evaluate and score each Bid against this set criteria. Please find further details in the below table:

	Criteria	Tenderers must demonstrate.....	Weight
<b>Compliance</b>	<b>Tender Compliance and Completion</b>	<ul style="list-style-type: none"> <li>Satisfactory completion of all documentation requested with sufficient information, submitted no later than the Closing Date specified.</li> </ul>	<b>Pass/Fail. Bidders who do not meet these minimum</b>

		<ul style="list-style-type: none"> <li>▪ Agreement to our mandatory policies as set out in 'Annex E- Non Staff Code of Conduct.'</li> </ul>	<b>requirements will not have their Bids further assessed.</b>
<b>Technical Proposal (65%)</b>	<b>Relevant skills in offered Services</b>	<ul style="list-style-type: none"> <li>• <i>Strong understanding of strategic fundraising concept development and innovation.</i></li> <li>• <i>Ability to lead concept ideation, testing, and refinement.</i></li> <li>• <i>Expertise in developing individual giving fundraising models, donor engagement strategies, and alternative revenue streams.</i></li> <li>• <i>Proficiency in audience research and analysis to inform strategy.</i></li> </ul>	30%
	<b>Previous Experience</b>	<ul style="list-style-type: none"> <li>• <i>Previous experience in similar Projects</i></li> <li>• <i>Previous experience working with INGOs</i></li> <li>• <i>Customer References provided</i></li> </ul>	25%
	<b>Engagement and Collaboration</b>	<ul style="list-style-type: none"> <li>• <i>Ability to professionally and sensitively work with different parts of the federation</i></li> <li>• <i>Competent project and account managers.</i></li> </ul>	10%
<b>Financial Proposal (30%)</b>	<b>Pricing Schedule</b>	<ul style="list-style-type: none"> <li>• Fixed pricing</li> <li>• Economically advantageous for the organisation</li> </ul>	<b>30%</b>
<b>Gender Responsive (5%)</b>	<b>Gender Sensitive Practices and Policies</b>	<p>As part of our ongoing Gender Responsive Procurement Initiatives, Bidders will be allocated 5% of the overall score if they meet one or more of the following:</p> <ul style="list-style-type: none"> <li>▪ If headed up by a woman</li> <li>▪ If supplier is a women-owned business: A legal entity in any field that is more than 51% owned, managed, and controlled by one or more women.</li> <li>▪ If the % of women in management positions is over 35%</li> <li>▪ If % of women workers is 55% or above</li> <li>▪ If robust gender equality initiatives are in place and active. E.g. WEPS signed, gender equality</li> </ul>	5%



		procurement policy, any additional gender-sensitive program implemented.	
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## 6. Evaluation of offers

The Tender Panel will review all Bids to ensure they meet the minimum requirements listed under the 'Compliance' section in the above table. Following this, each Bid will be assigned a score on the basis of predetermined criteria and their associated weighted scorings.

The contract(s) will be awarded to the Bidder(s) who represent the best overall value for Plan International in terms of the evaluation criteria set out above. By participating in this tender, you acknowledge and understand that Plan reserves the right to:

- Decide not to award to any supplier
- Decide to award to one or more suppliers
- Decide to readvertise the opportunity
- Not necessarily accept the lowest cost offer

Notification of award of contract will be issued via e-mail.

## 7. Terms & Conditions

By submitting a Bid as part of this Tender process, you also acknowledge and understand that:

- Plan International will not be liable for any costs or expenses incurred in the preparation of your offer
- You or your company will undergo vetting checks against an Anti-Terrorism and Sanctions Database as part of due diligence protocols
- Plan International reserves the right to keep confidential the circumstances that have been considered for the selection of the offers
- Part of the evaluation process may include a presentation from the Bidder and a site visit by Plan International staff, where applicable and necessary
- Plan International reserves the right to alter the schedule of tender and contract awarding
- Plan International reserves the right to cancel this tender process at any time and not to award any contract
- Plan International reserves the right not to enter into or award a contract as a result of this invitation to tender
- Plan International does not bind itself to accept the lowest, or any offer
- Any attempt by the Bidder to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or Plan International during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its offers and may result in the termination of a current contract where applicable
- You accept in full and without restriction the conditions governing this tender as the sole basis of this competition, whatever its own conditions of sale may be, which you hereby waive
- You have examined carefully, understood and comply with all conditions, instructions, forms, provisions and specifications contained in this tender dossier. You are aware that failure to submit a tender containing all the information and

documentation expressly required, within the deadline specified, may lead to the rejection of the tender at Plan International's discretion

- You are not aware of any corruption practice in relation to this competition. Should such a situation arise, we shall immediately inform Plan International in writing
- You declare that you are affected by no potential conflict of interest, and that you and our staff have no particular link with other Bidders or parties involved in this competition. Should such a situation arise during performance of the contract, you shall immediately inform Plan International in writing
- You accept Plan International's standard terms of payment which are **30 days** after the end of the month of receipt by Plan of a proper invoice or, if later, after acceptance of the Goods or Services in question by Plan International Ltd

## 8. Plan International's Ethical & Environmental Statement

- The organisation should establish environmental standards and good practices that follow the principles of ISO 14001 Environmental Management Systems, and in particular to ensure compliance with environmental legislation
- The organisation should seek to set reduction targets in areas where the organisation's activities lead to significant environmental impacts

## 9. Submission Checklist

**Please note Plan International are unable to accept submissions which are accessible by an online link, for example SharePoint, Dropbox etc. Please submit the documents as email attachments.**

Document	Form
<b>Annex A - Supplier Questionnaire</b>	All companies to complete. Individuals need only complete applicable areas, the areas that are not applicable mark as N/A.
<b>Annex E - Non-Staff Code of Conduct</b>	Please sign and date this document and return in PDF format.
Detailed Proposal in response to the ToR including proposed scope, methodology and timelines.	<i>PDF version</i>
Detailed Financial proposal, including daily / hourly rates, expenses etc.	<i>PDF Version</i>
Company profile / Team Structure & CVs	
Ethics and child safeguarding approaches, including any identified risks and associated mitigation strategies	

<ul style="list-style-type: none"> <li>• Example of previous work</li> <li>• Examples of social media content you feel portrays a similar tone and/or style that would fit the needs of Futures For Youth. This content does not need to be material that your office has produced or has any association with – we are simply looking to get an understanding of how you see FFY coming to life on social channels</li> </ul>	
References	