



# Request

# For Quotation

# NextGen Optimising Retention Data Analysis

Main Facts Table	
RFQ reference	<b>RFQ FY25-198 NextGen Optimising Retention Data Analysis</b>
RFQ launch date	26 March 2025
Contract Manager	Ryan Lander, NextGen Sponsorship
<b>Deadline for submission of offers</b>	9 <sup>th</sup> April 2025

Submission of offers to [procurement@plan-international.org](mailto:procurement@plan-international.org)

*Please include the RFQ reference number above in all correspondence*

## 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 it's 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 NextGen Initiative comes in. This initiative is to keep the best of what we have by strengthening the one-to-one fundraising 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.

NextGen 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 Organisations (NOs – fundraising offices) and Country Offices (COs – implementing offices) intention to stabilize income and have greater impact in the communities we work with.

## Identified problem

One sponsor to one sponsorship participant (1:1) 'child sponsorship' is currently a fundraising offer across all NOs however there is no unified approach to selling or servicing sponsorship. As a result, each NO uses differing acquisition and retention metrics, each NO provides a different sponsor experience and so, for example, the way in which cancellations are processed can look very different depending on the NO that a sponsor has signed up with. This means that the efficiency of servicing 1:1 child sponsorship has room for improvement. With evidence to state that our current sponsor base is Plan's most valuable asset, Plan needs to ensure it is doing what it can to not only preserve this but also to raise the bar in terms of the sponsor experience to surprise and delight where possible.

Data analytics work was conducted through a pro-bono arrangement with Northeastern University using anonymized data. The concluding reports provide some recommendations however the

data needs to be validated, and the content made appropriate for an internal audience. In order to get the most benefit from the analysis, a wider data strategy for the programme is also needed to ensure follow-through.

## Identified solution

Resource augmentation of:

- FTE support with data analytics capability to cover the following questions:
  1. How can we translate the analysis on Plan's retention data into actionable, insight-backed recommendations?
    - What are the narrative points or questions to extract from the analysis that will have the greatest impact across National Organisations ('NOs' - i.e., fundraising offices)?
    - What is the perspective of National Organisations on the key findings from the retention analysis?
    - How can the NextGen Initiative improve the data driven decision making environment related to sponsorship and individual giving channels? What processes or methods, and systems would be recommended to improve the collection and analysis processes in Plan?
  2. How might we accelerate the production of key deliverables relating to the NextGen program?

## Overall project goal and purpose of consultancy

- The project's objective is to leverage insight from the existing analysis completed by Northeastern
- Confirm/validate the data and findings with a sample of NOs
- Ensure the content is appropriate for use to drive internal conversations and actions against the recommendations
- To take the opportunity to lift the impact of the work into a wider data strategy outline/ recommendation related to individual giving fundraising

## Intended results

- Validated analysis that can be shared internally for the purposes of:
  - a. Highlighting the value of combined data and the insight it can provide
  - b. Creating a shared understanding of problems that are common across National Organisations
- Clearly articulated approach to data collection, analysis and decision making for the programme and Plan International related to sponsorship and individual giving.

## 1. Requirements

This project will work with existing and ready-to-go data and reporting. It will involve working alongside the global sponsorship operations team, as well as confirming and validating the data and findings with key staff from National Organisations.

This project will include the reworking of existing reports, validation of underlying data and resulting recommendations, development of internally facing documents/dashboards for NO use.

Our selected agency will:

- Work together with stakeholders across Plan to refine existing reports
- Develop versatile, digestible content that summarises key points made in the reports
- Leverage the data-rich reports from Northeastern to produce an outline data strategy for the project moving forward that includes a suggested roll-out plan

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

### Project period

The project is estimated to be started during Spring 2025 and completed in 6-8 weeks.

### Indicative timeline:

#### Week 1

- Materials familiarisation

#### Weeks 2-4

- Data validation
- Document development

#### Weeks 5-8

- Data strategy approach development
- Support to accelerate wider programme deliverables as needed

### 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 developing client-ready documentation in a variety of formats including PPT and Word
- Solid understanding of data analysis techniques and data strategy approaches with experience providing data strategy recommendations aligned to data handling best practice
- Proficient in data validation methods and techniques
- Ability to professionally and sensitively work with different parts of the federation
- Competent project and account managers.

### List of documents to be submitted with the RFQ

RFQ must be inclusive of the following documents:

Document	Form
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Supplier Questionnaire: (Inclusive) of Health & Safety Policy, ISO Accreditation and any other requested policies as outlines in the questionnaire). All suppliers should complete this form unless they have already completed a similar form within the last three years.	Annex (2) – All companies to complete. Individuals need only complete applicable areas, the areas that are not applicable mark as N/A
Plan International Non-Staff Code of Conduct. It is mandatory for all supplier to agree to this policy.	Annex (3)
Detailed proposal in response to the ToR including proposed scope, methodology and timelines	
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	
Detailed Financial proposal, including daily fee rates, expenses etc.	
Examples of previous work	

### Submission of offers

Offers must be received before the deadline specified in the “Request for Quotations”

The offer must be sent via email to [Procurement@plan-international.org](mailto:Procurement@plan-international.org), with the subject line “**RFQ FY25-198: NextGen Optimising Retention Data Analysis**”

### Evaluation of offers

Shortlisted suppliers may be invited to discuss their proposals in more detail at Plan’s discretion.

Plan International, at its sole discretion, will select the successful RFQ.

Plan international shall be free to:

- Accept the whole, or part only, of any submission
- Accept none of the proposals
- Republish this Request for Quotations

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 supplier and a site visit by Plan International staff, to offices.

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

Value for money is very important to Plan International, as every additional £ saved is money that we can use on our humanitarian and development work throughout the world.

Plan International may award multiple contracts and all contracts will be non-exclusive.

## **2. Contract Payment terms**

Please note that, if successful, Plan International's standard terms of payment are **30 days** after the end of the month of receipt of invoice, or after acceptance of the Goods/Services/Works, if later.

## **3. Plan International's Ethical & Environmental Statement**

The supplier 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

## **4. Clarifications**

The onus is on the invited companies to ensure that its offer is complete and meets Plan International's requirements. Failure to comply may lead to the offer being rejected. Please therefore ensure that you read this document carefully and answer fully all questions asked.

If you have any queries in relation to your submission, or to any requirements of this RFQ, please email:

[procurement@plan-international.org](mailto:procurement@plan-international.org).

Thank you for your proposal.