

Request for Proposal (RFP)

Title: New Donor Acquisition

Helvetas invites interested parties to provide offers for the services as described below.

1. Background and schedule

Helvetas Swiss Intercooperation invites interested agencies to submit proposals for the design and implementation of a new acquisition programme for new donors.

The required service details are elaborated in this document, more specifically under **Appendix 1 – Terms of Reference (ToR)**.

2. Timetable

	DATE	TIME - CET
Tender announcement published on the Helvetas website and advertised via various digital channels.	19 Sept 2025	N/A
Deadline for written enquiries to procurement.HO@helvetas.org	10 Oct 2025	17:00 CET
Last date for Helvetas to issue clarifications (clarifications can be found in the same link where this RFP was posted on Helvetas' website)	17 Oct 2025	17:00 CET
Deadline for submitting offers to the procurement.HO@helvetas.org account ¹	24 Oct 2025	17:00 CET
Agency Pitch invitations to the three top-scoring bids after the first stage of technical offers evaluation	03 Nov 2025	N/A
Briefing three top-scoring bidders for the pitch presentation, and setting up the presentation date and time with each bidder within the 20-27 Jan 2026 period	06 Nov 2025	N/A
Three top-scoring bidders prepare a pitch presentation based on the information received during the briefing.	07 Nov - 19 Jan 2026	N/A
Pitch presentations (in Helvetas Zurich Office)	20 – 27 Jan 2026	N/A

¹ Any application received after this deadline will not be considered.

3. Nature of the contract

A framework agreement with a term of four years will be drawn up with the agency that is awarded the contract.

4. Negotiations

Helvetas reserves the right to enter into negotiations with all, or individual, or part of eligible bidders in order to amend and/or complete their original offers. Negotiations may concern the technical, financial, legal and other aspects of the contract.

5. Conditions of participation and grounds for exclusion

Participation is open to all legal entities registered in Switzerland or the EU.

Entities or groupings of such entities (consortia) are allowed to apply. A consortium may be a permanent, legally established grouping or a grouping that has been constituted informally for a specific tender procedure. All members of a consortium (i.e. the leader and all other members) are liable to Helvetas, while the leader takes the lead responsibility.

The following are not eligible to participate:

- Public officials
- Consultants may only be named in one bid submitted by an agency or consortium. Multiple mentions in several bids will result in exclusion from the process.

6. Costs for preparing the bid

All costs incurred by the bidder in connection with the preparation and submission of the bid will not be reimbursed. This also applies to costs incurred in the course of negotiations or discussions. The bidder is fully responsible for all costs. A cancellation fee is provided for the pitch phase, see article 9.2.

7. Provisional commencement date of the contract

01 April 2026.

8. Planned implementation period and possible contract extension

Cooperation with the selected agency will begin on 1 April 2026. The contract has a term of four years and can be terminated by either party within six months.

9. Evaluation of bids

Bid evaluation will be conducted in two stages. Each bid will be evaluated in accordance with the criteria and the weighting as explained in this document. In the case of bids submitted by a consortium, these criteria will be applied to the consortium as a whole. The criteria for evaluation of services will be examined in accordance with the requirements indicated in this document and its attachments.

The entire evaluation procedure is confidential. The Technical Evaluation Committee (TEC) decisions are collective, and its deliberations are held in a face-to-face or virtual session. The members of the TEC are bound to secrecy. The evaluation reports and written records are for official use only and may be communicated neither to the bidders nor to any party other than Helvetas.

9.1 Evaluation of bids – stage one

Eligibility, Technical and Financial offers will be evaluated during stage one as per the criteria set below.

9.1.1 Eligibility criteria

Only the bidders that provide a signed form below will be processed for further evaluation:

- **Eligibility Documentation Form (See ELIGIBILITY DOCUMENTATION under PART 1 below)**

9.1.2 Evaluation of stage one technical criteria of eligible offers

The evaluation is carried out by an internal Evaluation Committee (TEC) based on the following criteria. This step does not require any creative work in advance, and no cancellation fee will be paid.

Requirements	Description	Documentary evidence	Weighting points
1. Experience in acquiring new donors or customers	Proven experience in implementing acquisition measures/campaigns	Project examples with results (proof of success)	15
2. Proven fundraising expertise	Solid knowledge of fundraising, including KPIs (e.g. ROI, conversion rate, retention)	Project examples with results (proof of success)	15
3. Strategic approach and methodology	Quality and creativity of the strategic concept for new donor acquisition	Description of the proposed approach and strategic methodology (referring to Appendix 1- ToR)	25
4. Degree of innovation and digital focus	Integration of digital channels and tools, new innovative acquisition approaches	Cross-media and innovative project examples with results	10
5. Personnel capacity and team structure	Availability of qualified staff, clear allocation of roles	Staff profiles, organisational chart	5

9.1.3 Evaluation of the stage one Financial offers

Once the technical evaluation scoring is final the TEC will be processed with the Financial offers evaluation.

Requirements	Documentary evidence	Weighting points
Financial offer according to instructions in PART 2 of this document	Financial offer in CHF	30

At the stage one, offers will be evaluated based on the score of the technical offer and the average price of the financial offer, using the 'Relative Cost Scoring' method.

Any bidders scoring **below 50 points** in the stage one evaluation, will be automatically dropped from this procurement process.

9.1.4 Submission of bids – stage one

Bids must be submitted via email in electronic format only. The Technical and financial offers should be submitted in separate password protected files. The third file containing the passwords should be open without password.

The technical offer shall contain:

- Signed Eligibility Documentation Form²** – as per ELIGIBILITY DOCUMENTATION PART 1 below
- Bidders have to supply the technical offer, accompanied by the following proof/documentation mentioned in the first-stage technical requirements tables above, such as:
 - Experience in acquiring new donors or customers - Project examples with results (proof of success)
 - Proven fundraising expertise - Project examples with results (proof of success)
 - Strategic approach and methodology - Description of the proposed approach and strategic methodology
 - Degree of innovation and digital focus - Cross-media and innovative project examples with results
 - Personnel capacity and team structure - Staff profiles, organisational chart
 - Sustainability and quality assurance - Data protection concept, ethics guidelines

The name of the file should have the bidder's name, Reference No, and the text 'Eligibility and Technical

² Electronic copies of eligibility documentation should be provided only by the winning bidder prior to contract signing.

offer documents' (for example, **Agency Name OC-0001-MC eligibility and technical offer documents**).
And

The financial offer shall contain:

1. **Filled and signed Financial Offer form** - as per PART 2 - Financial offer below

The name of the file should have the bidder's name, Reference No, and the text 'Financial offer documents' (for example, **Agency Name OC-0001-MC financial offer documents**).

The Password file should have the bidder's name, Reference No, and the text 'passwords' (for example, **Agency Name OC-0001-MC passwords**).

The subject of the email should contain only the PRF reference number (**OC-0001-MC**).

The body of the email should contain the bidder's official name, address, and telephone number.

Offers and file with passwords must be submitted in German or in English to the following email address only: procurement.HO@helvetas.org. Offers submitted after the deadline mentioned under point 2, Timetable of this RFP, will not be considered. The counted official receipt time is the time shown on the email received from the bidder.

9.2 Evaluation of bids – stage two

The three top-scoring bidders from the evaluation of bids – stage one, will be contacted for the second stage of the evaluation, which is the pitch presentation. The selected bidders will be invited for a detailed briefing by TEC (1 hour and 30 minutes, remote or on-site). The briefing agenda and the information shared/required will be the same for the three bidders (including the task, sample project, target group, and budget). The bidder that is awarded the contract will be commissioned. The two bidders that are not selected will each receive a cancellation fee of CHF 7,500.

9.2.1 Evaluation of pitch presentation - stage two

Requirements	Description	Documentary evidence	Weighting points
Pitch presentation in front of the TEC at the Helvetas office in Zurich Presentation should be prepared and presented according to the information provided during the briefing with TEC. Bidders should present their approach, initial creative ideas, and a detailed	Quality and clarity of the presentation showing creativity, clarity, and feasibility	Pitch presentation document and the minutes gathered by the TEC chairperson	25
	Further development of the strategic approach showing how the Stage 1 concept is refined		25

cost breakdown.	Innovative and implementable campaign proposal, including draft timeline and budget		20
	Team and roles presented showing competencies and fitness		10
The annual cost breakdown in front of the TEC during the pitch presentation ³	Where doable, the cost breakdown should be related to the financial offer rates provided in the stage one bid evaluation.		20

After the pitch has been completed, an individual debriefing (30–45 minutes, remote or on-site) will take place with all three bidders.

10. Contract award

Contract will be awarded to the economically most advantageous offer. The economically most advantageous offer is determined through a two-stage evaluation process.

In the first stage, the economically most advantageous offer is established by weighing technical quality against the average price on a 70/30 basis. Bidders must be among the top three highest-scoring bids to qualify for the second stage evaluation.

In the second stage, the final ranking is based on the maximum score. The bidder providing the highest points during the Pitch presentation will be awarded the contract.

After evaluating the offers, Helvetas reserves the right to enter into negotiations with all or part of the eligible bidders to amend and/or complete their original offers.

Helvetas reserves the right to contract only part of the required services or cancel this tender procedure should it not be satisfied with the quality of offers.

11. Modification or withdrawal of bids

Bidders may modify or withdraw their bids in writing before the deadline for submission. No modifications are permitted after this deadline.

Helvetas retains ownership of all bids that have not been withdrawn. Bidders have no right to claim the return of their bids.

³ The annual cost breakdown will be evaluated for plausibility, efficiency, and transparency, rather than for cost competitiveness.

12. Validity of offers

Bidders are bound by their tenders for 90 days after the deadline for submitting offers. In exceptional cases, before the period of validity expires, Helvetas may ask bidders to extend the period of validity for a specific number of days, which may not exceed 40.

13. Signature of the contract(s)

Within 10 working days of receipt of the contract already signed by Helvetas, the selected bidder shall sign and date the contract. Failure of the selected bidder to comply with this requirement may constitute grounds for annulling the decision to award the contract. In this event, Helvetas may award the tender to another bidder or cancel the tender procedure.

14. Terms of payments

Helvetas in Switzerland is a payer of value added tax (VAT). Prices in the application must be submitted, taking into account all expenses.

The payment will be made via bank account transfer to the winner of the tender in CHF within a maximum of 30 working days from the date of acceptance of goods or execution of services or works. Cases of non-performance of obligation and their legal consequences will be separately indicated in the contract.

15. Terms of cooperation

Helvetas has the right to choose a supplier/ implementer on the given offer according to its own discretion. Helvetas has the right to re-formulate the Request for Quotation (RFQ), Invitation to Bid (ITB) or Request for Proposal (RFP) to its own discretion, if any additional items are needed.

16. Ethics clauses/Corruptive practices

Attempts to obtain confidential information, enter into illegal agreements with competitors or influence the evaluation team or Helvetas will result in exclusion from the procedure and, if necessary, further sanctions.

Bidders must not have any conflicts of interest with other bidders or parties involved in the project implementation.

Helvetas reserves the right to suspend or terminate the tender procedure or a contract that has been awarded if corruption is detected at any stage.

If it is determined that a contract was awarded or executed on the basis of so-called unusual commercial expenses (e.g. undeclared commissions, payments to offshore recipients, fictitious invoices), the contract may be cancelled and the responsible suppliers sanctioned.

Helvetas may suspend or cancel the procedure if substantial errors, irregularities or fraud are detected – even after the contract has been awarded.

17. Contract language

All written communications within the scope of this tendering procedure and all contract documents must be written in German or English.

18. Further information

The conclusion of the procedure and the award of a contract are subject to the availability of financial resources.

Helvetas reserves the right to cancel this award procedure at any time and without giving reasons – without any resulting obligations.

PART 1 - ELIGIBILITY DOCUMENTATION FORM

LIST OF REQUIRED DOCUMENTS

Eligibility criteria

Requirements	Documentary evidence
Legal registration	Certificate of incorporation or business registration issued by the relevant authorities, or any other relevant evidence. (e.g. "Excerpt from the Swiss Commercial Register".)
Tax compliance	Recent tax clearance certificate OR official statement from tax authorities indicating taxes are paid or under a payment plan, or any other relevant evidence.
No pending legal/financial issues	Signed & dated Affidavit or Declaration of Honor by CEO/legal representative confirming no open case of a dispute, an execution procedure, a reorganization, a bankruptcy, or an insolvency procedure ⁴
Sustainability and quality assurance. Approach to ethics and data protection (FADP – Federal Act on Data Protection)	Data protection concept, ethics guidelines, or any other relevant evidence.
Minimum 5 years in operation	Ensure the entity's first registration date is provided in the certificate of incorporation or business registration issued by the relevant authorities.

STATEMENT⁵

I, the undersigned (for consortiums, every consortium member should sign a separate statement as part of this application) hereby declare that we have in possession all documents listed above. All documents are valid as requested in the table above and hard copies or electronic copies can be distributed as/when needed.

Signed on behalf of the bidder

Name	
Signature	
Date	

⁴ Helvetas reserves the right to do a background check if needed

⁵ Statement should be signed by each member of the consortium, if a consortium.

PART 2 - FINANCIAL OFFER

Hourly Rates

The Financial offer must be presented in CHF. The fees proposed in this offer should be all inclusive for the services stipulated below. The bidder is responsible for all other taxes and duties in compliance with relevant legislation.

Services item – specifications	Fee per hour / CHF
Strategic consulting	
Consulting/project management	
Consulting assistance	
Administration	
Concept	
Art direction	
Text writing	
DTP/image editing	
Average price from the prices showing above	

Signed on behalf of the bidder

Name	
Signature	
Date	

APPENDIX 1

TERMS OF REFERENCE

Contract-no: TBD

Project/mandate no: TBD

Project/mandate name/country: Switzerland

Client: **HELVETAS Swiss Intercooperation**

Weinbergstr. 22a, P.O. Box, 8021 Zurich, Switzerland

Contract term From: 01.04.2026 To: 01.04.2030

These Terms of Reference (ToR) serve as the basis for selecting an external agency to strategically and creatively rebuild and sustainably develop the area of new donor acquisition (private donors) at Helvetas Swiss Intercooperation. The tender is being conducted in accordance with the applicable procurement process in the form of a Request for Proposal (RFP).

1. Background

Acquiring new donors is becoming increasingly challenging. Existing channels such as external mailings and unaddressed leafleting are generating ever lower response rates (see Attachment 1), and digital channels have so far been unable to compensate for this decline. At the same time, rising costs for paper, production and postage mean that new donors only break even after several years.

Helvetas is therefore looking for an agency partnership with fresh ideas, new approaches and strategic vision. As a first step, interested agencies are invited to submit a written proposal (technical proposal).

The top three agencies (the highest scoring based on their technical proposal offers) will then be invited to a pitch. Details of the pitch will be provided in a separate briefing.

2. Objective

The objective is to evaluate and select an agency to develop and implement a new, effective acquisition programme for new donors (excluding face-to-face, i.e. street advertising and door-to-door advertising). Helvetas needs to attract around 15,000 new donors each year to maintain its donor base. Around 3,800 of these are acquired through direct dialogue (street advertising and door-to-door advertising). This channel will continue unchanged and is not part of the tender.

3. Target Output

The selected agency will develop a cross-channel programme that generates at least 11,200 new donors annually (excluding face-to-face). The programme should be scalable, impact-oriented and sustainable in the long term. An annual budget of CHF 1.44 million (excluding VAT, all-inclusive) is available for this purpose. The agency will be responsible for strategy, conception, creative implementation, production and shipping coordination. The operational launch is planned for 1 April 2026. Approximately CHF 1.1 million is available for 2026 (around CHF 340,000 will be used in the first half of the year for existing channels (unaddressed mailing)).

Attachment 1 – Acquisition of new donors at Helvetas

- **Overall trend declining** – After peaking in 2022 (Ukraine), the number of new donors has recently fallen significantly.
- **Outhouse mailings** are becoming much less important – This channel has seen a marked decline in recent years. Response rates are falling, while the average donation is rising. Nevertheless, the ROI is developing negatively. We have therefore shifted from OHMs to unaddressed mailings.
- The response rate for **unaddressed mailings** is also falling continuously, while the average donation amount is rising significantly, thus partially compensating for the decline.
- **Face-to-face** remains stable – despite fluctuations, this channel shows relatively consistent performance without any drastic slumps.
- **Online** has no sustainable growth momentum – after a significant increase during humanitarian crises, the channel is falling back again.
- **DRTV** did not perform as a test channel.

Note: In stage 1 only a few key points are listed without specific figures; the briefing for stage 2 will provide more detailed background information.