

Printing and Postage Supply ActionAid UK

Request for Proposal & Quotation

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1 Copyright Information

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2 Document History

[Complete the items below as to authorship and necessary Glossary]

Version	Date	History	Name
0.1	30/03/2022	Version 1	Tom Treasure – Head of Retention

3 Glossary

AA	ActionAid
AAUK	ActionAid UK

Outsourcing partner	Your organisation responding to the request for proposals to tender

4 Organization Information

ActionAid is an international charity that works with women and girls living in poverty. Our dedicated local staff are changing the world with women and girls. We are ending violence and fighting poverty so that all women, everywhere, can create the future they want. Learn about our vision, our mission, our approach, and our impact.

More information on the organisation will be made available upon request or can be accessed through our website www.actionaid.org.uk

5 Current Situation Overview

ActionAid UK is part of the ActionAid Federation, and as such plays a key role in global fundraising. ActionAid UK is dependent on systems and technology to deliver the key strategic objectives and the out-sourcing partner will play a key role in supporting our ambitions laid out in our strategy.

ActionAid is reliant on strategic outsourcing providers to partner on core business deliverables including print, production, fulfilment and mailing in order to maintain contact and communication for marketing and fundraising purposes, primarily with our existing engaged supporter base.

ActionAid has long worked with a primary single supplier for print and fulfilment, alongside a downstream access postage provider, specifically Whistl, and Royal Mail for direct mail. We have a policy to re-tender our key suppliers and it is now three years since the last print and mail tender.

6 Project Purpose & Scope

This request for proposal (RFP) is established on behalf of ActionAid UK to seek able outsourcing providers for print and/or mail services.

Programme Objectives

This RFP has been issued to identify and appoint a supplier (or a number of suppliers) to fulfill AAUK's printing needs as laid out in the Requirements section of this document.

It is likely that the supplier(s) will be contracted for a minimum of three years. This will be on no guarantee of work or agreed minimum value basis.

This RFP itself is issued on a 'no expectation of work or value of services' basis.

We aim to deliver value for money and good service on all of our direct mail activity and reduce print costs wherever possible.

Wherever possible we will look to streamline print procurement for direct mail across the organisation.

We will always expect our supplies to adhere to at least the same ethical and environmental standards as we do.

Project Scope

The scope encompasses all printed mail and postal services within the Printing and Postage category definition plus any other services which AAUK might deem as required for the fulfilment of cost effective, sustainable and values led direct mail, direct marketing and fundraising print and postal mail operations.

AAUK spend approximately £500,000 per year on print and its associated products and services (including postage).

Our printing requirements are mainly for direct marketing purposes and include the printing, fulfilment and mailing (including postage) of targeted mailings, magazines and catalogues.

Printing & Postage Category Definition

Printing refers to primarily paper-pulp-based stock and print for direct marketing and direct mail purposes. This can include but is not limited to outer envelopes, letterheaded paper, and booklets and inserts of varying stock types and GSM's via a variety of print types such as litho or digital depending on the size of the job. Sometimes we order in bulk to hold as stock, other times we order per campaign job with volumes from a few hundred items such as for a bespoke event invite, to over a hundred thousand, such as for emergency appeals. It is important that any supplier understands the particular zero VAT rating opportunities that HMRC affords charities, for example on cash appeal mailings.

Postage in this case refers to downstream access services for direct mail. We have an Agency Access Agreement with HMRC and our existing supplier and would wish to replicate this arrangement with any additional postage supplier. We typically use downstream access for medium-high volume direct mail campaigns.

Capabilities Required by Supplier

The following are essential requirements to be able to successfully fulfil the contract:

- > the ability to offer and communicate expert and appropriate print solutions and advice to staff in a range of departments with varying needs.
 - The ability to rapidly (and sometimes iteratively) quote on demand
 - Make recommendations for cost savings both on request and proactively (e.g., different processes, specifications)
 - To directly liaise with business stakeholders and third parties as required
 - Provide expertise on print technicalities and recommendations around postal services and costs
 - Specific knowledge of the charity print market and in particular VAT when pricing for appeals, and any other factors affecting charity clients.

- > The ability to produce, in house or by sub-contractors a full range of printing and finishing services including:
 - digital, litho and web printing
 - collation, binding and special finishes

- fulfilment, including collation, packing, delivery to single end point, or release to mail carriers
 - mailing services – mailing management with downstream access suppliers including Whistl but not limited to Whistl, i.e. booking collections and completion of other administrative tasks as required to smoothly integrate and work with postal services providers.
- > the ability to manage fulfilment/postage in a cost-effective manner and advise and facilitate quote on the most appropriate mailing solutions for each job.
- > the resources to allocate a designated account manager or team to handle all enquiries and orders to ensure consistency of service
- > an in-house pre-press facility for the provision of art-working to AAUK as required
- > the ability to securely transmit and receive data electronically in a range of formats
- > the provision of an archiving service for artwork and graphics
- > facilities for secure/controlled storage as required, and ability to deliver stored stock and/or new printed materials to a single end point in the UK (specifically our office in Chard in Somerset) at short notice and make stock available for print (i.e., in an emergency appeal scenario) within 24hours.
- > ability to ensure strict adherence to AAUK's Corporate Identity Guidelines for all printed materials
- > ability to adhere to other policies as specified by AAUK, including our Supplier Code of Conduct.
- > the ability to demonstrate on-going cost savings and the reporting of the same, alongside exceptions/errors and performance metrics reporting on the account.
- > expert knowledge of latest GDPR guidelines and any other relevant statutory and data protection guidelines.

> the ability to provide an expedited service for emergency appeals whenever the need arises, in line with terms and timings agreed in a Service Level Agreement.

> be able to work to tight turnaround times when required (for example, in reaction to current events or opportunities).

8 Vendor Instructions

Please submit a tender document which addresses each of the following areas:

Value for money

To demonstrate how you would offer value for money, please provide quotes on the provided basket of goods- "Print specs for RFP April 2022.xlsx". Charges should be broken down to show costs for the various elements and include any additional cost-saving methods suggested. Please cost on the assumption you are our preferred supplier and will be receiving all of our DM business. Please address each job lot separately.

Monitoring and reporting

Please provide information on your proposed method for monitoring contract performance, with reference to quality, cost, delivery and environmental indicators. You should also state how you would propose to feedback on this management information to us.

Lead times

We often work to tight deadlines so please give an indication of your standard turnaround times on jobs detailed in the 'Basket of goods' appendix.

Job quotation and invoicing process

Please describe your quotation request preferred processes and turn-around times. And provide invoice terms and any specific or special notices.

Emergency appeals

In the case of emergency appeal mailings, we should always aim to be the first charity mailing to be received by supporters. Please respond to the draft emergency SLA, how and whether you would be able to work with this and provide any questions, suggestions, or notes on this as relevant to your operations.

Account management

The appointed supplier will be contacted by several members of staff throughout the organization. Please state how you would propose to manage ActionAid's account effectively.

Whereas we are unable to give an exact value of this contract as our spend is dependent on the number of emergency appeal mailings we decide to do, in previous years our average spend figure has been £400-500,000 and we do not anticipate any significant changes to this in the near future.

Environmental standards and commitments

Please detail your environmental standards and commitments and how you work with clients to improve theirs also. If you use third party suppliers as part of your offer, please detail how you ensure conformance. Please note that as a minimum you will be asked to adhere to AAUK's environmental standards should yours be unacceptable to us.

Postage and postal supplier relationships and expertise

Please confirm your arrangements with postage providers and your level of client support and internal expertise around postal services and providers, ideally with reference to our current agency access arrangement and any arrangements you have to maximise efficiency and minimise cost for direct mail and with charity clients in particular, if possible.

8.1 Schedule for Evaluation Process

The expected timeline for the evaluation and decision-making process is as follows

Process step	Date
RFP & Tender documents available to vendors	13/05/2022
Opportunity for vendor meetings with ActionAid UK staff	13/05/2022 – 06/06/2022
Deadline for RFP responses	06/06/2022
Vendor interviews	10-17/06/2022
Selection of vendor/contract negotiation	24/06/2022
Contract negotiations	July 2022

Please note that the answers to any questions raised by a vendor during the RFP stage will be shared to all vendors.

8.2 Proposal Submission & Contact Information

Please submit electronic copy of your proposal, including all supporting documentation to:

Name	Joanna Armah-Kinson
Company	ActionAid
Address	33-39 Bowling Green Lane, London, EC1R OBJ
Phone	02013 122 0561
E-mail	CommercialUK@actionaid.org

Contact Person(s) for any questions about the RFP by email only.

Joanna Armah-Kinson	CommercialUK@ActionAid.org
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Please note that answers to all questions will be made available to all suppliers involved in the tender.

8.3 Proposal Format

A vendor's internal template for responses to RFP will be accepted. The New Supplier Questionnaire provided herewith has to be answered and attached along with the proposal.

Please note that if you have already responded to the pre-qualification questionnaire you are not required to answer any duplicate questions.

8.4 Notifications

Vendors will be notified regarding requests for additional information, formal presentations and the outcome of the selection process through email.

9 Basis of Award

All proposals become the property of ActionAid UK and will be evaluated by the IT RFP Review Team.

Evaluation and selection of vendors to provide products and services as defined in this RFP to ActionAid UK will be based on the following criteria, which are given in no specific order. **(you may delete or add as required by your department's requirements)**

- Price
- Cultural fit
- Company history and stability
- Robustness of project systems and processes in place
- Depth of overall experience
- Quality assurance offered
- References provided
- Proposed solution and support terms
- Expertise of proposed team
- Information as provided by vendors or as available through other sources
- Other various business compliance issues as referred or contained herein.
- Timely and complete response to RFP
- Time taken to have a working solution in place

Weighting to scoring will be determined along these areas:

Quality %25	Price %25	Cultural Fit %15	Environmental %15	Customer service / account
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				management %20
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The RFP Review Team reserves the right to accept or reject any or all RFPs received.

The RFP review team is comprised of Joanna Armah-Kinson Contracts and Procurement Manager ActionAid UK; Tom Treasure, Head of Supporter Retention; Kim Harrison, Production Specialist. **ActionAid reserves the right to add or remove members of the panel at any time.**

The RFP Review Team reserves the right to negotiate with respondents to this RFP, within the requirements of the RFP, to best serve the interests of ActionAid UK. However, vendors **must not assume** an opportunity to negotiate and are cautioned to submit their proposals on a best and final basis since an award or decision is likely to be made without further negotiation based on pricing and terms of the original submittals. Accordingly, all requirements must be included with your initial offer.

All proposals submitted will be considered to be proprietary by ActionAid UK and will not be released to any outside party, in part or in total unless required by law. Neither the transmission of this RFP to a prospective bidder nor the acceptance of a reply shall imply any obligation or commitment on the part of ActionAid UK.

If vendor needs to take exception to anything under the RFP, these exceptions must be clearly identified on the RFP response.

All prices and conditions must be shown.