

Expressions of Interest (EOI) Guidelines:

## 2017 TEXT GIVING PILOT PROGRAM

### PROJECT OVERVIEW

In a united initiative to support charitable giving in Australia, the country's leading telcos – Telstra, Optus and Vodafone Australia – embarked on a Text Giving pilot program in July 2015.

This pilot period has now been extended until October 2017 and we are seeking up to **five** additional charities to take part in the pilot program scheduled for completion in October 2017.

Co-ordinated by a working group brought together by Telco Together Foundation, the pilot currently involves up to 15 registered charities. Subject to the selection criteria outlined below, the pilot aims to include a mix of large and small charities, charities activating emergency relief appeals, event-based campaigns and existing appeals with a strong media presence.

### HOW IT WORKS

Charities selected to participate in the Text Giving pilot will have the opportunity to include a PSMS donations 'call to action' (e.g. "Text GIVE to 19 xx xx to donate \$5") in their campaign materials, opening up a new fundraising channel.

- Each participating charity is allocated its own short code, (phone number), and each PSMS sent under the pilot will have a donation value of \$5.
- Once the donor sees the call to action and decides to donate, they text the keyword to the number shown.
- Provided they have sufficient phone credit, \$5 will be donated to the charity and will appear as a charge on their mobile phone bill.
- The donor will then receive a 'thank you' SMS containing a link to a tax receipt, (functionality to be provided by OpenMarket).

Charities selected to participate in the pilot will be required to:

- Work with the pilot's SMS aggregator, Open Market, to ensure their campaign materials and SMS message flows comply with applicable regulation for PSMS content providers
- Be responsible for all promotion and marketing of this fundraising channel
- Agree to take part in the pilot program review at the conclusion of their campaign.
- Agree to a minimum \$730 setup fee in addition management costs which will be 1% of donation revenue.

Each participating charity is provided access to a donor log entailing the following detail;

- Mobile telephone number
- Time and date of donation
- Keyword entered.

After completion of the pilot period in October 2017, the success of the pilot will be reviewed with cost, uptake by charities and donors, charity/donor experience, remittance process and administrative effort being assessed to determine the future of PSMS donations in Australia.

## ELIGIBILITY CRITERIA

To be eligible for participation in the pilot, charities must:

- Hold and maintain Deductible Gift Recipient (DGR) status for the duration of the pilot
- Hold and maintain relevant state-based Fundraising Licences
- Be able to provide a customer helpline from 9am-5pm Monday-Friday throughout the campaign period (regulatory requirement for PSMS content providers)
- Have a minimum \$1,000,000 total revenue

## EOI INFORMATION REQUIREMENTS

To submit your EOI submission please visit: <https://podio.com/webforms/18108384/1216464> to fill in your key organisation's contact details and to attach a word or pdf submission document outlining the responses to the following criteria (no more than 4-5 pages);

1. Outline your proposed fundraising campaign/s that will use Text Giving (you may nominate more than one and campaigns which all need to be completed by October 2017)
2. Outline your charities main beneficiaries
3. Geographical focus of campaign/s i.e. Local, State, multi-state or national?
4. When will your campaign/s start and finish?
5. What is the fundraising target of your campaigns?
6. How do you propose to market/communicate the Text Giving Phone Number (outline approach and channels)?
7. Please provide details on any proposed donor conversion activity after text giving donation (i.e. telemarketing and/or SMS marketing)
8. What is the approximate overall budget for your campaign/s?
9. How will you measure the success of your campaign/s?

## PROJECT TIMING

Key dates for the project are as follows:

- Submissions due: Midnight Friday 5<sup>th</sup> May 2017
- Successful charities notified: Wednesday 15th May 2017

## QUESTIONS

For any questions regarding this request for expression of interest, please email Telco Together;

**Email:** [cameron@telcotogether.org.au](mailto:cameron@telcotogether.org.au).