

Terms of Reference (TOR) for Procurement of Services: Designer – Direct Mail Appeal & Communication

About HelpAge India

Help Age India is a non-profit organization dedicated to serving the elderly population in India. It was established in 1978 and has since been actively involved in various initiatives aimed at improving the quality of life for senior citizens. HelpAge India runs various programs and services to address the needs of older persons. These include Shelter support for destitute elderly, healthcare services, elder helplines, livelihood support, advocacy for elder rights, and disaster relief efforts tailored to the elderly population.

HelpAge India invites bids for “**Designer – Direct Mail Appeal & Communication (Agency/Individual/Experts)**” as per details, terms and conditions given below:

I. Terms and conditions

1. The agency can be an **individual/HUF/Partnership firm/Company incorporated under the laws of India.**
2. This RFP is not an offer by HelpAge India, but an invitation to receive responses from the eligible bidders.
3. No agency shall be entitled to submit more than one bid whether jointly or severally. If one does so, all bids wherein the agency has participated shall stand disqualified.
4. The agency shall bear all costs associated with the preparation and submission of bid.
5. The agency must have PAN (Permanent Account Number) and registered with GST and the document for the same is to be attached.
6. HelpAge India reserves the right to accept /reject/ select one or more than one agency and to annul the bidding process any or all bids at any time prior to award of contract without thereby incurring any liability to the affected agency.
7. The supplier should have all valid licenses, approvals, certificates, registration from all statutory authorities like Income Tax/GST/any other relevant and mandatory requirements.
8. Schedule of supply will be provided by HelpAge India while issuing Purchase Order/ email intimation to the selected bidder. In case of delay in supply, penalty will be levied.
9. HelpAge India reserves the right to cancel the contract based on performance without assigning any reason thereof.
10. Evaluation of the bids will be done by Purchase Committee from HelpAge India.
11. HelpAge India management reserves the right to change (increase or reduce) the numbers/units as per its sole discretion and Project requirement.

12. Documents required to release the payment:

- a. Bill / Invoice mentioning Permanent Account Number of Income Tax Department
- b. Documentary proof of the delivery/ service including E-Way Bill, wherever applicable, as per Purchase order

13. Agencies that will be technically qualified would only be considered for opening of financial bids.

14. The bidder is expected to examine all instructions, forms, terms and specification in this RFP. Failure to furnish all information required under this RFP or to submit a bid not substantially responsive to this RFP in all respect will be at bidder's risk and shall result in rejection of the bid.
15. The bidder and their respective officers, employees, agents shall observe the highest standards of ethics dividing the bidding process. HelpAge India has adopted a zero-tolerance policy on gifts and hospitality. Suppliers are therefore requested not to send gifts or offer hospitality to HelpAge India personnel. Notwithstanding anything to the contrary contained herein, HelpAge India shall reject bid without being liable in any manner whatsoever to the bidder if it determines that the bidder has directly or indirectly or through an agent, engaged in corrupts/fraud tent/coercive/undesirable or restrictive practice in the bidding process.

16. Indemnity

The bidder shall indemnify HelpAge India against all actions, suits, claims and demands brought or made against HelpAge India in respect of anything done or committed to be done by the bidder in execution of or in connection with the work of this contract and against any loss or damage to HelpAge India in consequences to any action or suit being against the selected vendor for anything done or committed to be done in the execution of this contract.

17. The RFP shall be evaluated strictly based on the substantive information/credentials/documentary evidences submitted by the agencies.
18. The bidder is expected to examine all instruction, forms, terms and specification
19. HelpAge India Management reserves the Right to award the work to more than one Agency as per requirement. Delivery has to take place in location.
20. All the bid needs to be submitted via **procurement email id – procurement@helpageindia.org**
21. Agencies would not be allowed to subcontract, partial/full of the work assigned to them. In such case the Management reserves the right to cancel the contract with the agency.
22. The rates quoted by the agency will be inclusive of all Taxes/Packing and Freight Charges etc. Agency should submit the financial bid as per the Annexure-3: Financial Bid Format.
23. Agency shall bear the Insurance if any taken.
24. The rate quoted by the agency will be valid for one year from the award of the contract
25. Items not meeting the specified requirements has to be returned.

Annexure- 1 Technical Bid Format

(To be filled, sign & stamp by Agency)

A

S.No	Particulars	Remarks	Work Experience
1	Experience with HelpAge India/Govt. Agency/NGO/DevelopmentSector	Yes/No	
2	Experience in similar Type of Product/Service supply	Year	

B

S.No	Particulars	Last 3 Year		
		FY 2023-24	FY 2024-2025	FY 2025-26
3	Annual Turnover as per Audited Financials (Copies of the Audited Financials needs to be attached or Turnover Certificate from Chartered Accountant)			

C

S.No	Particulars	Top 5 Client List with value (Rs)
4	Clientele List	

D

S. No.	Particulars	Details (GST & PAN No.)
5	PAN	
6	GST	

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C-14, Qutab Institutional Area, New Delhi-110062

Annexure- 2: Technical Bid Format

Location -: PAN India basis

	SPECIFICATION (TECHNICAL)	AGENCY'S REPOSE (in brief)
1.	Supply to be done according to the quantities, specifications, quality, schedule and locations approved by HelpAge India	
2.	The acknowledgement for delivery/services of supply to be submitted as proof along with invoice.	
3.	The agency is capable (as defined in RFP document) and agrees to complete the supply within specified time as agreed upon otherwise penalty clause will be invoked.	
4.	Past experience of the agency in supply of items or similar items, as listed in this RFP. Please give details or provide list of clients to whom similar goods have been supplied.	
5.	Management reserves the right to empanel one or more agency (on the basis of quality consideration/experience of the agency) in addition to rates parameters.	
6.	Constitution of the agency whether Proprietorship/Partnership/Company. Give details of Proprietor/ Partner/Directors.	
7.	For how many years the agency is engaged in similar line of activities.	
8.	Registration certificate with GST need to be submitted along with the technical quotation.	
9.	Penalty clauses will apply as per the company's policy, as per terms of the purchase order: the decision of the HelpAge India shall be final and binding in this regard.	
10.	The final price will remain valid for one year from the award of the Purchase order/ contract	

Please Note:-

- 1. Form must be completed in all respects; incomplete forms may liable to be rejected.**
- 2. The form must be duly stamped & signed by the Authorised signatory**
- 3. The form must be submitted on or before due date and time.**

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Annexure-3: Financial Bid Format

We are submitting the below quotation for the above after understanding completely the technical specifications and other terms and conditions of the RFP.

	SPECIFICATIONS	AGENCY'S REPOSE (Agree/Disagree)
1.	Rates will be inclusive of all Taxes/Levies/Packing and Freight Charges etc.	
2.	TDS as applicable will deduced as per Income Tax Act, 1961	
3.	Payment will be made through cheque / NEFT/ RTGS.	
4.	Duly Certified bills along with signed delivery challan will be submitted for every completed supply on monthly basis.	
5.	Payment shall be made in 30 days after submission of original invoice & proof of delivery of goods at our Head Office at Delhi.	
6.	Penalty clauses will apply as defined in the RFP: the decision of the HelpAge India/Project Management shall be final and binding in this regard	

Terms of Reference (TOR) Designer – Direct Mail Appeal & Communication

Location: Hybrid model

Duration: TOR based empanelment/tenure

The agency/consultant/expert /resource person of DMA & Communication will conceptualise, design and deliver high-quality creative materials to support Direct Mail Appeals (DMA), donor communication, fundraising campaigns, awareness initiatives and organisational branding. This assignment is critical to strengthening donor engagement, enhancing brand consistency and ensuring visually compelling communication that upholds HelpAge India's dignity-first ethos.

2. Key Objectives

- Provide creative design support for all DMA and donor communication campaigns.
- Ensure visual consistency and adherence to HelpAge India's brand guidelines across print and digital platforms.
- Deliver timely, impactful creatives that drive donor retention, acquisition, and public awareness.

3. Scope of Work

A. Direct Mail Appeals (DMA) & Fundraising Creative Support The Designer will:

- Develop creative concepts and multiple design options for the following recurring and campaign-specific materials (samples – hard copy/soft copy – will be provided):
 - Thank You Mailer (Planner, Mailer, Envelope)
 - Revival Mailer (3 cycles per year with fresh designs)
 - Gift Card (Gift Card, Mailer, Envelope)
 - Diwali Mailer (Mailer + Envelope)
 - Calendar with Mailer
 - New Year Greeting Card (Card, Mailer, Envelope)
 - Annual Review Mailer & Envelope
 - Tax Mailer
 - General & Birthday Envelopes (2 types)
 - F2F Donor Form & Checklist
 - SAVE Sponsored Form, Teacher Sheet, Brochure & Certificates (3 designs)
- Support cold mailing, warm donor mailing, and campaign-specific appeals as required.

B. Communication & Organisational Design Support The Designer will:

- Design the following materials (multiple design options to be provided):
 - Newsletters (8 pages)
 - Annual Report & Annual Review
 - Brochures (2/4 pages)
 - Posters, Banners, Folders, Standees, Event Backdrops, Invitations
 - Certificates, Presentation Decks, Internal Communication Creatives
 - Awareness campaign creatives
- Ensure all designs align with HelpAge India's dignity-first communication principles (positive, respectful, non-exploitative imagery and messaging).

C. Coordination, Workflow & Asset Management The Designer will:

- Collaborate closely with DMA, Resource Mobilisation, Communication, Digital, and Programme teams to understand briefs.
- Incorporate feedback promptly and deliver within agreed timelines.
- Maintain a complete, organised digital archive of source files, print-ready files, and campaign assets.

4. Expected Deliverables

- High-quality, print-ready and digital-ready creatives for all listed DMA and communication materials.
- Consistent application of brand guidelines across all outputs.
- Well-maintained design archive and reusable templates. All open files of the creatives/design pieces will need to be submitted with all layers unlocked version before final closure of a design.

6. Expertise required:

- Proficiency in Adobe Photoshop, Illustrator, InDesign and CorelDraw.
- Working knowledge of Canva and basic motion graphics tools (added advantage) and latest New Gen tools.
- Strong understanding of print production processes and digital optimisation.
- Excellent eye for layout, typography, colour, and visual storytelling.

- Ability to translate complex social messages into dignified, impactful visuals.

8. Terms of Engagement

- **Professional fee:** to be mutually agreed.
- **Intellectual Property:** All final designs and source files shall become the exclusive property of HelpAge India upon full payment.
- **Confidentiality:** Strict confidentiality of donor data, beneficiary information and internal materials must be maintained.
- **Code of Conduct:** All work must align with HelpAge India's Communication Outreach & Risk Mitigation Guidelines (dignity-first approach, ASCI compliance).
- Maintain confidentiality of all donor and campaign-related information.
- Be available for urgent campaign requirements.
- Proactively contribute creative ideas aligned with the elder cause.

Please send your quotation only mail id :

procurement@helpageindia.org by 2nd May 2026

Annexure-4

To be submitted by bidder/Vendor /Tenderer

(On Rs.10 stamp paper)

This has reference to the RFP dated In response to the RFP, we have submitted our technical & financial bids on.....at your email address
In connection with the above bids, we hereby declare as under: -

- i- That we are neither related to any of your Board Members, Officers and other employees nor do we have any financial, commercial or other interests with any of the above persons in any capacity whatsoever.
- ii- That we have submitted the bids in the name of M/S..... and declare that no other bids have been submitted by us in the name of any other firms/companies/proprietors/individuals which comes under the same management and

related parties.

iii- We undertake that:

- a. All information furnish by us in respect of fulfilment of eligibility criteria and qualification information of the Bid is complete, correct and true.
- b. All copy of documents, credentials and documents submitted along with this Bid and genuine, authentic, true and valid.

iv- We undertake that

- a. We are not involved in any litigation that may have an impact of affecting or compromising the delivery of services as required under this assignment.
 - b. We are not blacklisted by any Central/ State Government/ agency of Central/ State Government of India/Public Sector Undertaking/ any Regulatory Authorities/ Multilateral Funding agency in India for any kind of fraudulent activities.
 - c. No Criminal proceeding are pending against the Proprietor / Partner /Director of the firm/ company (Agency) and also against the firm/ company.
(Indicate any convictions if any against the above persons or Agency.)
 - d. The firm/company has not been declared insolvent, bankrupt, not in receivership, or being wound up, not have its affairs administered by a court or a judicial officer
- v. We hereby undertakes that If any information and document submitted is found to be false/incorrect or we violate any declaration at any stage of contract, HelpAge India has right to cancel my/our Bid and action as deemed fit may be taken against me/us, including termination of the contract, forfeiture of all dues and banning of our firm etc.

We understand that HelpAge India is not bound to accept any bid received against RFP and HelpAge India has right to reject all or any bid without assigning any reason or giving any explanation whatsoever.