



Annex A: Terms of Reference
RFP/2016/764
Face to face Fundraising Services in The Netherlands

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the Agency has helped tens of millions people to restart their lives. Today, UNHCR is one of the world's principal humanitarian Agencies. Its staff of more than 6,700 personnel is helping more than 45 million people in 125 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see <http://www.unhcr.org>.

Fund Raising activities in the Netherlands only recently started and include two different main programmes: the Individual Giving (IG), raising money from individuals both regular and one-off, and the Leadership Giving (LG) targeting companies, foundations, Small and Medium Sized Enterprises (SMEs) and High Net Worth individuals.

Inside the Individual Giving strategy, F2F programme is expected to have an important role.

UNHCR Netherlands is now searching for a Face to Face external Agency to help the organization raise more funds in order to boost contributions to the organization to deliver long-term sustainable solutions that provide security, dignity and future for all those caught up in tragedy of conflicts and displacements.

Recruiting new regular donors through the direct dialogue technique is, consequently, the main objective. 2016 will be a year of testing whereas over the next few years we can roll out the tested programme (if successful).

1.2 Statement of Purpose & Objectives

The purpose of the present RFP is to establish a Long term Agreement (LTA) with one (or more) external Face to Face Agency/ies to support UNHCR Netherlands in developing and managing a best practice for Face to Face acquisition programme for recruiting quality donors.

The Frame Agreement will be signed with the successful bidder(s) for a period of two (2) years with the possibility of extension for one (1) year. The performance of the supplier(s) will be evaluated after the initial period of four (4) months (Test Phase 1) and later after each year within Phase 2 (2017 and 2018).

UNHCR expects to achieve the following ROI:

- Year 1: 0.6
- Year 2: 1.4
- Year 3: 2.0

UNHCR Netherlands at this moment offers no specific regular donations programme and we are looking for non-earmarked donations with a maximum Life Time Value per donor.

2 Requirements

2.1 Core requirements

The contractor must be based in the Netherlands and have good knowledge of the Dutch NGO market.

The contractor will need to deliver the following:

- Fundraising retention services specifically:
 - Confirmation of direct debit / donation calls
 - Production and delivery of welcome pack or e-mail (when applicable in your proposal or anything else when part of your proposal).
 - Other retention services (donor journeys) are an asset.
- Data Delivery specifically:
 - Conduct the Face to Face fundraising campaigns at events, business, and targeted public sites (street) or door to door to solicit regular giving donations (please see specifications below).
 - Collect donations in the form of a pledge by a donor to have an amount deducted from the donor's bank account and paid into the bank account of UNHCR Netherlands on a regular basis as a donation to UNHCR –programmes.
 - Contractor will be required to deploy at the request of UNHCR teams of suitable competent persons with relevant expertise (herein after referred to as Fundraisers, Branch Manager and Team Leader) to perform the Face to Face donor acquisition and retention services.
 - Contractor will be required to mobilize sufficient numbers of qualified operation support staff to provide the services.
- Other services specifically:
 - Design, produce and deliver (in close contact with UNHCR) **all materials necessary** to provide the services. These can consist of (but are not limited to): welcome calls, welcome email or package, uniforms, presentations, forms, etc.

The UNHCR offers the following expected parameters to be considered when preparing your proposal: (keep in mind that we might choose to work with more than 1 supplier so numbers of donors to be recruited could be shared between suppliers).

- Minimum¹ objective Phase 1 is 200 net new donors per month in average, meaning approximately 800 net donors for the period of September 2016 to December 2016
- Minimum objective for the period of Phase 2 January 2017 to December 2017 is 670 net new donors per month in average, meaning 8000 net donors on a full year basis for 2017
- Minimum objective for the period of Phase 3 January 2018 to December 2018 is 670 net new donors per month in average, meaning 8000 net donors on a full year basis for 2018

¹ Please note that these numbers are UNHCR estimation based on PSFR annual plan. Vendors are requested to prepare their bids based on their realistic capacity / availability, even it is higher or lower then UNHCR requirements.

Vendors are requested to prepare their bids based on their realistic capacity/availability, even if it is higher or lower than UNHCR requirements.

- Monthly donations / pledges can be set up by direct debit (or new payment methods you propose under the innovation section).
- Fundraisers cannot accept cash gifts on the street.
- Our expectation is to view proposals that are designed to reach a minimum return on investment based on:
 - The required number of new donors to acquire per year;
 - The average value of a donor on a monthly basis;
 - Cost of acquisition and retention/donor journeys
 - A **realistic** estimation of attrition: donor attrition (% of donors who stop their donations during the first 12 months, by evaluating at the 1, 2, 3, 6 and 12 month mark).

Any adjustment to the number of target donors to be acquired shall be mutually agreed by UNHCR and Contractor and subject to revision every six (6) months.

2.2 Other mandatory services, required for the performance of the key requirements

The contractor is expected to provide the following services based on the above mentioned conditions:

Recruitment of staff

- Plans and coordinates the recruitment of highly competent staff to effectively perform the activities as required under the UNHCR Face-to-Face programme.

Staff administration

- Monitors the attendance, performance and conduct of staff involved in the UNHCR Face-to-Face programme.
- Ensures that payment of the front-liners conforms to Dutch law.

Logistical Arrangement that support the F2F and donor journey operation

- Plans and applies for locations for the face-to-face teams
- Prepares and submits applications to obtain approval and all relevant permits from all concerned parties.
- If a recruitment site is obtained by virtue of a UNHCR corporate partnership, the contractor agrees not to provide a marketing campaign to recruit donors for other clients.

F2F materials

- Prepares **and produces** the presentation materials (including-but not limited to- tablet presentations, pitch cards, donation forms, banners, fundraising booth and **uniform**, identification) in close cooperation with UNHCR. The use of Ipads or other innovative material is welcome.

Controlling

- Control and submission of donation forms – ensures that donation forms are accurately completed and signed by donors. When using Ipads please explain if and how a signed form can be provided upon request to UNHCR.

- Each donation form should carry a unique serial number and should be strictly controlled by the Contractor.
- All donation forms must be accounted for at all times.
- Ensures that all completed or voided donation forms (paper or digital) are returned to UNHCR upon request within 2 working days.

Training

- Introduction training to all newly recruited face-to-face programme staff.
- Provides regular training for all fundraisers.
- Provides special training for team leaders.

Motivation

- Plans, develops and maintains motivation schemes as deemed appropriate.
- Prepares and submits proposal for motivation schemes to UNHCR for consideration and approval.

Performance Assessment

- Conducts daily performance assessments of fundraisers by team leader.
- Conducts daily and weekly performance assessments of team leader by operational manager.
- Conducts regular on-site supervision by operations managers.

Monitoring staff conduct

- Ensures that no face-to-face programme staff engages in any misleading or deceptive conduct.
- Ensures that apart from completing the donation forms no face-to-face programme staff accept any form of donation, including but not limited to cash or gifts.
- Ensures that no face-to-face programme staff commits any act which may compromise the image and interests of UNHCR.
- Ensures that all staff members comply with applicable laws and regulations whilst carrying out activities in relation to UNHCR face-to-face programme.
- Provides verbal reports of any misconduct or complaint in regard to staff engaged in UNHCR's face-to-face activities as soon as practicable and written reports with actions taken and/or proposed remedy within three (3) working days.

Reporting

- Prepares and submits monthly and weekly location plans for all face-to-face teams via email. (in case UNHCR works with more than 1 supplier they should be willing to share location plans in order not to be at the same place at the same time).
- Informs UNHCR of any change of location as early as possible.
- Prepares and submits weekly and monthly reports of donor acquisition results to UNHCR via email.
- Provision of verbal report of any misconduct or complaint received in regard to staff engaged in UNHCR's F2F activities as soon as practicable and of written reports with actions taken and/or proposed remedy to UNHCR within 3 working days
- Providing weekly and monthly reports of donor acquisition results and clawback reports or any form of monetary discount based on donor attrition.
- Holding weekly project management calls and monthly face to face meetings with UNHCR staff.

Data entry and daily processing

- Ensures data security of donor information.

- Deliver the data in the timeframe arranged with UNHCR (a minimum of 1 times a month) to the database of UNHCR and manages all change of donor details until the delivery. Data shall be sent through a safe server or encrypted.
- Specify how data can be sent: Excel, CSV, API or other.
- Welcome call after the registration to verify donor's commitment and data and to ensure the quality of the dialogue and information on the street.
- Welcome packages (if applicable in your strategy): developing and producing and (daily) "shipment" of welcome packages and/or SMS, Email and information materials.
 - o UNHCR Netherlands has no established service providers for above options so should go through contractor.

Specific other services

- Provide inbound call services / hotline for face-2-face donors.
- Reactivation calling to donors who fail to make a transaction (and / or other suggestions you have for a donor journey).

All plans and materials will be subject to sign off and approval from UNHCR

Innovation

We recognise that the Dutch F2F market is a mature and full market.

We believe that an innovative approach to F2F / Field marketing and of the follow up (donor journeys) is necessary to reach best possible ROI's.

- Please describe your view on innovation and which innovative projects you have done recently. Please explain your suggestions and innovative ideas and approach for setting up a F2F campaign (including donor journeys) for UNHCR.

Please make sure you describe all the costs of different services you propose and offer in Annex B Financial Offer Form.

2.3 Customer Responsibilities

The UNHCR is responsible for providing the following:

- Deliver content for and sign off on any acquisition material to be produced.
- Liaising with the Contractor, attends regular project management calls and meetings
- Reconciling reports submitted by the Contractor with UNHCR database reports

3 Content of the technical offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

3.1 Company qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including: Company profile, registration certificate and last audit reports
- Year founded
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates;
- Fundraising experience in the business or the number of similar and successfully completed projects to donor acquisition, retention and collection process;
- Presence and experience in The Netherlands
- Any relevant experience working with UNHCR, other UN Agencies and NGOs should be included;
- Number of similar and successfully completed projects.
- Number of similar projects currently underway.
- Self-certification that contracts are in line with Dutch law.
- Any information that will facilitate our evaluation of you company's substantive reliability, financial and managerial capacity to provide the services.
- Total number of clients, please provide a list;
- You are requested to provide three (3) references that we may contact from your current client list, including ones from working relationships with UNHCR Brazil or other UN Agencies. If submitting a partnership proposal, please provide references for each firm that is participating in the proposal bid.

3.2 Proposed services

- A description of the fundraising plan for Phases 1 (test 2016), and 2 (2017) and 3 (2018) and a description of the services offered
- Vendors are requested to prepare their bids based on their realistic capacity / availability, even it is higher or lower then UNHCR requirements.
- Give an overview of your offer (nr of donors you offer per year (2016/2017/2018); the expected average donation (per month or otherwise); the forecasted attrition rate at month 1-2-3-6-12;
- Describe your strategy for recruiting **quality** donors.
- Describe your donor retention program / donor journeys (if any).
- Comment on **all the requirements mentioned in chapter 2** and explain how you will meet them.
- Please explain any innovative suggestion your company has. This could be (but is not limited to) different payment methods, SMS payments, mobile payments, donor journey approach, experiences at acquisition sites etc. UNHCR Netherlands is open to annual donors or new payment schedules like period donors, as long as the targeted number of donors and ROI are met. Vendors are free to outline their strategy to recruit F2F donors.

3.3 Personnel Qualifications

- The composition of the team you propose to provide.
- Curriculum Vitae of core staff (maximum number of 5 short CV's).

3.4 Vendor Registration Form

- If your company is not already registered with UNHCR, please complete, sign and submit with your Technical Proposal the Vendor Registration Form (ANNEX C).

3.5 Applicable General Conditions

- Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the provision of services by signing this document (ANNEX D) and including it in your submitted Technical proposal.

4 Evaluation

4.1 Technical Evaluation

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: **70% from the total score.**

Criteria Description	Percentage
1. Company Qualifications	70%
General Liability / Capacity of the Company	
Overall F2F fundraising experience/time in business	
Presence / Experience in the Dutch NGO market /UN/UNHCR sector/environment	
2. Quality of Service	
Comprehensiveness of proposal	
Quality/clarity of interpreting and presenting fundraising services	
Systems in place such as telemarketing operation, database, bank processing, e-mail follow up	
Innovation	
Strategy of recruiting quality donors	
Quality/ Creativity of proposal and all other services offered, working with other 3rd party suppliers	
3. Project staff	
Experience of core people who will work on the project	

4.2 Financial Evaluation

The Financial offer will be evaluated (ANNEX B): **30% from the total score.**

- Please describe your Claw back / refunding system in case a sign-up does not make any donation or stops to donate for whatever reason within 12 months from the sign-up date in your Financial Offer (ANNEX B).

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s).

KPI's will be:

- Average number of donors per month compared to target
- Attrition rates
- Average monthly donation
- ROI : we are expecting an ROI return on its investments of:
 - Year 1: 0.6
 - Year 2: 1.4
 - Year 3: 2.0
- Cost per donor
- Live Time Value forecast
- Number and gravity of complaints received about conduct of the fundraisers