

Annex A: Terms of Reference

2017/HCR/HKG/RFP/10063

PROVISION OF RESEARCH SERVICE IN HONG KONG SPECIAL ADMINISTRATIVE
REGION (Hong Kong SAR) OF CHINA

28 September 2017
Reference: 2017/HCR/HKG/RFP/10063

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established on 14 December 1950 by the United Nations General Assembly. UNHCR is mandated by the United Nations to lead and coordinate international action for the worldwide protection of refugees and the resolution of refugee problems. UNHCR is an impartial organization, offering protection and assistance to refugees and others on the basis of their needs and irrespective of their race, religion, political opinion or gender. In all of its activities, UNHCR pays particular attention to the needs of children and seeks to promote the equal rights of women and girls. In its efforts to protect refugees and to promote solutions to their problems, UNHCR works in partnership with governments, regional organizations, international and non-governmental organizations.

1.2 Statement of Purpose & Objectives

The Office of the United Nations High Commissioner for Refugees (UNHCR) in Hong Kong started fundraising activities since 2007. People around the world who wish to support UNHCR's work could make financial contributions through its Sub-Office Hong Kong.

In 2017, Private Sector Partnerships (PSP) HK implemented a strategy to diversify its fundraising portfolio to cover additional face to face fundraising channels and digital fundraising approaches. We need to establish who our best prospect target audiences are across all channels and what key messages are most likely to influence their decision to donate and become UNHCR's regular giving donors.

PSP HK is also lacking a deep understanding of its donors and wishes to find out more in order to retain them longer and, where possible, increase the annual value that each donor delivers to UNHCR. Currently we only group donors by 'type' based on the status of their payment, using the following categories as of August 2017:

- New regular givers: Any donors recruited in the current financial year with no previous financial history with UNHCR. They signed up with a regular commitment of a monthly frequency.
- Active regular givers: Are donors recruited in previous years and continue to provide regular, ongoing donations. There are almost 30,000 donors majority recruited via face to face fundraising
- Lapsed regular givers: Were active regular givers but their payments have either been cancelled or cannot be debited, mainly due to the insufficient funds. There are 40,000 lapsed donors, majority from the face to face fundraising programme
- One-time donors: Are donors that have given single donations at least once i.e. they have never set up a regular commitment to UNHCR. There are about 8,000 in the database, some who have given in the last 12 months and many whose last donation was at least a year ago and often much longer.

More information can be found on UNHCR globally; www.unhcr.org and about UNHCR HK www.unhcr.org/hk

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The purpose of this Request for Proposal is to conduct research in order to understand UNHCR's potential and existing donors:

- To gain motivational, values/needs based and quantitative insights into UNHCR's prospect and existing donor base and create deeper segmentations based on the findings. This would start by evaluating UNHCR current key donor groups of active committed givers recruited from F2F and online channels, lapsed committed givers and prospects
- To understand the perception of UNHCR and refugee issues within the segmentation and their main triggers for responding and donating to UNHCR, supporting UNHCR over the long term and also cancelling their donation
- To use these insights to develop relevant propositions and messages that would resonate with the audiences and their needs /or values
- To understand the relationship, interaction and influence between each segmentation in order to design comprehensive fundraising strategies that improve donor acquisition and retention programmes
- To identify ideas for new prospect donor groups based on the research
- To test UNHCR's existing key messages, campaigns and materials among each group and gain suggestions on how to make them more relevant

The research will be conducted in HK, for UNHCR PSP HK office. The UNHCR expects to achieve the following;

- Increase retention rates of active committed givers by 10% during the first 12 months of their relationship with us
- Increase the value of existing donors by 5% through the annual upgrade programme and lower payment delinquency
- Increase the reactivation rate of lapsed donors to their committed gift from 3% to 6%
- Improve new donor conversion rates through face to face and telemarketing fundraising approaches by 10%

UNHCR expects that all items are clearly outlined in the company's offer. The successful bidder will be requested to maintain their quoted price model over the course of contract period.

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2 Requirements

2.1 Requirements for the Research for UNHCR's Prospect and Existing Donors

The purpose of this Request for Proposal is to identify profiles, motivations, values and segmentations of existing, new, lapsed and potential donors for UNHCR HK in order to improve acquisition and retention rates and long term donor value.

UNHCR HK is looking for a service provider to carry out the services. This will be a one-off project planned to be started from Dec 2017 for the period of three months, until Feb 2018,

- Propose research methodology and tools which will deliver the objectives, as described under 1.2. The methodology should include both quantitative and qualitative research method.
 - Quantitative research should have:
 - Minimum sample size from public: 1000
 - Minimum sample size from existing donors: 1000
 - At least 10 questions in the survey
 - Qualitative research should have minimum 6 focus groups with at least 60 sample size, which should include different groups of target audience such as new/long term donors, high/low value donors, non-donors/existing donors etc.
- Propose recommendations for how to use the findings to benefit future development of UNHCR's fundraising strategies
- Directly or through third party relationships provide all human resources, materials, technical skills and translation services required to deliver the project
- Provide and present in face to face meetings comprehensive reports from the insights gained from conducting the research, including evidence to support the findings in the form of data analysis, quotes from individuals and the key types of language used by participants
- Propose targeting opportunities, propositions and message development
- Validate propositions with identified donor segments

2.2 Performance of work

The Vendor is responsible for providing all supervision, equipment, labour, and materials necessary to complete the work as described herein. The Vendor shall supervise and complete the Project using its best skill and attention. The Vendor shall furnish management, supervision, coordination, labour and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of this Terms of Reference.

All services rendered by the Vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The Vendor shall conduct all its activities in strict confidence. The Vendor shall handle and respect data privacy, if applicable, in a professional manner.



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2.3 Compliance with the Government Requirement

The Vendor shall comply with all applicable laws, statutes, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the Project;

The Vendor shall give all notices required of it by governmental authorities relating to the Project.

If the Vendor violates laws or regulations that govern the Project, the Vendor shall indemnify and hold UNHCR harmless from and against any fines and/or penalties that result from such violation. To the extent that such violation is the result of negligence or other actionable conduct of the Vendor, the Vendor shall indemnify and hold UNHCR harmless against any third party claims, suits, awards, actions, causes of action or judgments, including but not limited to legal fees and costs incurred thereunder, that result from such violation.

2.4 Rejection and correction of work

During the course of the Project, the Vendor shall supervise and promptly discontinue any activities which (i) does not conform to the requirement in this Terms of Reference, or (ii) does not comply with any applicable law, statute, ordinance, code, rule or regulation of any authorities and agencies having jurisdiction over the Project.

UNHCR reserves the right to reject any work performed by the Vendor, in whole or in part, that, UNHCR's sole and absolute discretion, are unsatisfactory, unacceptable, undesirable, or inappropriate.

The Vendor shall promptly correct or require the correction of all rejected work and shall bear all costs of correcting such work.

2.5 Customer Responsibilities

UNHCR PSP HK will provide access to the donor database in order to conduct the research. Suppliers will be requested to sign a declaration of confidentiality. The following data fields are available:

General information

- Gender
- Date of birth

Contact information fields

- Address
- Phone number
- Email address

Financial History

- Payment type (monthly, one-time)
- Payment method (credit card, , autopay, bank transfer)
- Payment value (instalment, value)
- Payment start date
- Payment end date
- Number of attempted debits
- Number of successful debits
- Total value of successful debits

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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
- 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
- Three or more letters of reference, with contact information
- Please advise if your company is working or has worked with:*
 - another UNHCR office or any other UN organization;
 - in the public sector / NGOs;
 - government(s); or
 - in a UNHCR environment/ work setting.

**If yes, please provide UNHCR with the Name of the Contact Person, title and Contact Information in your Technical Offer, even if s/he is not one of your 3 references.*

- Number of similar (Donor Research) projects currently underway and/ or successfully completed; and total number of clients your company currently services in Hong Kong and as well as elsewhere and their identities.

Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services can be put into the technical proposal.

Please note that any relevant experience working with UNHCR or other UN Agencies or other NGOs are deemed essential technical criteria.

3.2 Proposed services

A description of your organization's capacity to provide the service:

- Proposed work approach, solutions and deliverables, quality of the technical response to the requirements as stipulated in the TORs Section 2.
- Proposal on methodology of the research and types of research
- Work plan to demonstrate how to implement the proposal
- Proposed timeline of the project
- Comprehensive knowledge of various research methodologies and trends in conducting research
- Strong analytical and organizational skills, thoughtfulness and discretion

If you are planning to work with subcontractors or consultants to provide the required services, please provide their names and include 3 references for each consultant and/or subcontractor.

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3.3 Personnel Qualifications

The composition of the team (with names, titles and relevant information) you propose to provide, including project managers, paid staff, subcontractors, consultants.

In particular:

- Describe the roles and responsibilities of each key member of your team (who/which subcontractors will directly handle/supervise the tasks/assist in operation) in fulfilling the full range of tasks included in the TOR;
- Specify the experience of each individual/ subcontractor who will directly handle/supervise the tasks/assist in operation;
- Describe their experience and expertise in working on similar projects, and/ or working with UN and/or not for profit international organizations;

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 acknowledgment of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

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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.

1. Company Qualifications (15%)	<ul style="list-style-type: none"> • General liability/ capacity of the company (5%) • Previous relevant projects (Donor research) executed (5%) • Relevant sector experience and experience working with not for profit and/ or UN (5%)
2. Proposed Services (40%)	<ul style="list-style-type: none"> • Content of the Proposal suitable for the requirement of the RFP (10%) • Methodology for Quantitative research suitable for requirement (10%) • Methodology for Qualitative research suitable for requirement (10%) • Suitability, creativity and quality of deliverables/ recommendations (10%)
3. Personnel Qualifications (15%)	<ul style="list-style-type: none"> • Experience of core people who will work on project (including experience with similar projects, and not for profit experience) (15%)
Total:	70%

The technical offer will be evaluated using the above criteria and percentage distribution: 70% from the total score. Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal in order to be considered further for the financial evaluation.

The maximum number of points that can be awarded per criteria is 5 points on a rating scale of 0 to 5 when 5 is the highest as per below overview:

Excellent	5	Excellent evidence of ability to exceed contract requirements
Good	4	Good evidence of ability to exceed contract requirements
Satisfactory	3	Satisfactory evidence of ability to support contract requirements
Unsatisfactory	2	Unsatisfactory evidence of ability to support contract requirements
Poor	1	Marginally acceptable or weak evidence of ability to support contract
No submission	0	Information has not been submitted or is unacceptable

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5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier.

- All the committed deliverables are delivered
- The committed research methodology are executed as proposed
- The sample size are met
- Presentation of findings and recommendations are made