

2018/HCR/HKG/RFP/10087

Annex A: Terms of Reference

Face to Face Donor Recruitment Services
in Hong Kong SAR and Macao SAR of China for UNHCR Private Sector
Partnerships

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR), the UN Refugee Agency, leads international action to protect people forced to flee their homes because of conflict and persecution. We deliver life-saving assistance like shelter, food and water, help safeguard fundamental human rights, and develop solutions that ensure people have a safe place to call home where they can build a better future. We also work to ensure that stateless people are granted a nationality.

UNHCR Private Sector Partnership (PSP) in Hong Kong SAR and Macao SAR of China has been running successful face to face fundraising since 2007 and is a proven method of generating funds for UNHCR. As part of the global UNHCR strategy we want to continue our fundraising efforts in 2019 and the following years through face to face fundraising. The office is now opening this RFP in order to recruit agencies to provide F2F donor recruitment services in Hong Kong and Macao SARs of China.

1.2 Statement of Purpose & Objectives

In order to achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR is seeking to enter into a service agreement for the maximum period of thirty six (36) months for donor acquisition in Hong Kong SAR and Macao SAR of China, and other F2F-related supporting services with companies specialized in such service areas.

PSP is looking forward to contracting more than one service provider for F2F donor recruitment services.

The agreement will be signed with the successful bidder(s) for an initial period of twenty four (24) months (Phase 1) and will be extended at the sole discretion of UNHCR for additional twelve (12) months (Phase 2), upon satisfactory evaluation of performance.

The initial period for Phase 1 is tentatively planned to start on 1 January 2019 until 31 December 2020, potentially extendable for a further period of twelve (12) months from 1 January 2021 to 31 December 2021.

UNHCR expects to achieve the following Return on Investments (ROI):

Year 1: 0.7

Year 2: 1.5

Year 3: 2.2

Please note that ROI figures are UNHCR estimation based on PSP annual plan.



2 Requirements

2.1 Core requirements

The Contractor will need to deliver the following:

- Conduct F2F fundraising campaigns at events, businesses, and targeted public sites (street) to solicit regular giving (i.e. monthly) donations;
- Collect donations in the form of a pledge by a donor to have an amount deducted from the donor's credit card or bank account and paid into a UNHCR bank account on a regular basis as a donation to UNHCR by the donor;
- Contractor will be required to deploy at the request of UNHCR team(s) of suitable competent persons with relevant expertise (hereinafter referred to as "Fundraisers" and "Team Leaders") to perform the F2F services; and
- Identify Operation Manager(s) to serve as a focal point to oversee the effective implementation of the F2F programme. Contractor(s) will be required to mobilize sufficient numbers of operation support staff to provide the service.

UNHCR offers the following expected parameters to be considered when preparing your proposal:

- Objective¹ Phase 1 is 24,000 new donors in twenty four (24) months and Phase 2 is 12,000 new donors in another twelve (12) months, meaning 1,000 new donors per month;
- Given UNHCR's ambition to increase its activities in Hong Kong and Macao SARs of China on fundraising, bidders are invited to submit proposal and financial plans indicating their maximum capacity acquiring new donors for UNHCR per each year;
- Higher average donation value as well as lower percentage of no-show (sign-up donors that do not activate their donations) will be parameters used by UNHCR for the evaluation of the supplier;

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

- Minimum acceptable monthly donation Monthly donation must be at least HKD100 per month;
- Monthly donation must be set up by credit card or direct debit;
- Donations and pledges are to be factored into the technical and financial proposals in the following terms:
 - Pledge: A potential new donor has been signed up by a F2F fundraiser – a donor form for a monthly donation is completed. It will remain a pledge until the 1st donation is processed and confirmed by UNHCR's donation processing platform;

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

- Donor: A donor who has made at least 1 successful donation (donation has been successfully confirmed by the UNHCR's donation processing platform).
- Our expectation is to view proposals that are designed to reach a minimum return on investment based on:
 - The number of new donors to acquire per year;
 - The average value of a donor on a monthly basis;
 - Cost of acquisition;
 - 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).
- Financial proposals will be evaluated on the basis of the **Cost per Donor**.

Number of donors are an indication and will be discussed during the contract period. 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 services, required for the performance of the key requirements

Contractor(s) is expected to provide the following services based on the above mentioned conditions:

Deployment to Macao SAR of China

- Deploy a maximum of six (6) fundraisers to travel to Macao SAR on a pre-planned and scheduled regular basis when venues become available. The maximum number of travelling to Macao SAR will be twelve times per one calendar year

Recruitment of fundraisers

- Plan and coordinate the recruitment of highly competent fundraisers to effectively perform the activities as required under the UNHCR F2F programme.

Staff Administration

- Monitor the attendance, performance and conduct of staff who are involved in the UNHCR F2F donor recruitment services; and
- Ensure payment of the fundraisers conform to the local legislations.

Logistics Arrangement that Supports the F2F Operation

- Plan and apply for locations for all F2F teams;
- Obtain prior approval for paid venues that require reimbursement from UNHCR;
- The contractor agrees not to provide services to recruit donors for parties other than UNHCR if the recruitment site is obtained by virtue of a UNHCR partnership;
- Prepare and submit applications to obtain approval and all relevant permits from all concerned government agencies;
- Coordinate the production, obtain approval, arrange deposit and payment for the production of marketing materials that require reimbursement from UNHCR;

- Manage the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners and uniforms to support the F2F donor recruitment services;
- Provide marketing materials including but not limited to identification badges, tables, chairs and presentation folders for the F2F donor recruitment services;
- Set up and coordinate the backend process if using electronic devices for presentation and sign-up; and
- Obtain all permits, licenses and/or consents required under its articles of association and prevailing laws and regulations to perform its business activities, and to execute and deliver these services.

Control and Submission of Donation Forms

- 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;
- Donation forms should be assigned to Fundraisers with records and are all returned to the Team Leader or the Contractor daily;
- Ensure that donation forms are accurately completed and signed by the donors;
- Ensure that all completed or voided donation forms are returned to UNHCR within five (5) working days;
- If using electronic devices to capture donation, ensure that all is set up correctly and coordinate the backend process with UNHCR; and
- Data entry and processing: including registering forms and transferring the data electronically to UNHCR in the format agreed by UNHCR.

Training

- Provide induction training to all newly recruited F2F fundraisers;
- Provide regular trainings for all fundraisers; and
- Provide regular special trainings for team leaders.

Motivation

- Plan, develop and maintain motivation schemes as deemed appropriate;
- Prepare and submit proposal for motivation schemes to UNHCR for consideration and approval; and
- All incentives for motivation schemes should be covered in your financial proposals (price "all inclusive").

Performance Assessment

- Conduct daily performance assessments of fundraisers by team leaders;
- Conduct daily and weekly performance assessments of team leaders by operation manager(s); and
- Conduct regular on-site supervision by operation manager(s).



Monitoring Staff Conduct

- Ensure that no F2F programme staff engages in any misleading or deceptive conduct;
- Ensure that apart from completing the donation forms no F2F programme staff accepts any form of donations including but not limited to cash and gifts;
- Ensure that no F2F programme staff commits any act which may compromise the image and interests of UNHCR; and
- Ensure that all staff members comply with applicable laws and regulations whilst carrying out activities in relation to UNHCR's F2F donor recruitment services.

Analysis and Reporting

- Prepare and submit monthly location plans for all F2F teams;
- Inform UNHCR of any change of location within the same day;
- Prepare and submit weekly and monthly reports of F2F results and clawback reports or any form of monetary discount based on donor attrition;
- Provide reports to measure key performance indicators (KPIs) including but not limited to average sign up rate, average monthly donation, age distribution of donors, payment method to monitor overall, team, fundraiser performances and location differences;
- Provide reports to analyze the performance of testing strategies and introduction of new measures;
- Provide a verbal report of any misconduct or complaint received in regard to staff engaging in UNHCR's F2F activities as soon as practicable and a written report with actions taken and/or proposed remedy to UNHCR within 3 working days; and
- Arrange monthly face to face meetings with UNHCR.

Innovation

- We believe that an innovative approach to F2F fundraising is necessary to reach best possible ROIs. 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 for UNHCR.



2.3 Customer Responsibilities

UNHCR is responsible for providing the following:

- Designing and printing acquisition materials including pitch cards, leaflets, donation forms, uniforms, lanyards and banners;
- Liaising with Contractor and attending regular meetings and management calls; and
- Providing information, documents, materials and assistance reasonably necessary to enable F2F services to be provided including but not limited to:
 - Education and training as reasonably required by the Contractor; and
 - Materials for Contractors to develop marketing collaterals (e.g. folders with UNHCR logos and artwork or any other material).



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.

No pricing information or fees can be included into the technical proposal. Failure to comply with this requirement will result in disqualification.

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 in Hong Kong and Macao SARs that will be involved in the project work with founding dates;
- Fundraising experience in the business;
- Any relevant experience working in the non-profit sector, with NGOs or UN or UNHCR should be included;
- Number of similar and successfully completed F2F projects in Hong Kong and Macao SARs, as well as elsewhere and their identities;
- Number of similar F2F projects currently underway;
- Total number of existing clients, please provide a list;
- Three or more letters of reference or client testimonials, and/or three (3) references with email address that we will contact from your current list; If submitting a partnership proposal, please provide references for each firm that is participating in the proposal bid; and
- Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

3.2 Proposed Services

- A description of the fundraising plan for Phase 1 and 2 and a description of the services offered, in tandem with other partners, third party suppliers, contractors (if applicable);
 - Vendors are requested to prepare their bids based on their realistic capacity/availability, even it is higher or lower than UNHCR requirements;
 - Outline of strategy for recruiting high quality donors and committed to make long-term monthly contributions;
 - Give an overview of your offer to UNHCR (number of donors you acquire in the year of 2019, 2020 and 2021; the expected average donation; the forecasted attrition rate at month 1, month 2, month 3, month 6 and month 12);
 - Give an overview of the maximum number of donors your agency can deliver;
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- An operational description of your experience in soliciting and setting up indoor venues. Please provide example(s);
- A description of current systems in place such as recruitment, training, database, design and material development, complaint handling mechanism;
- Please describe your view on innovation and which innovative projects you have done recently. Please explain your suggestions and innovative ideas and approach for UNHCR F2F campaign; and
- Any other services offered that bring value to F2F service.

3.3 Personnel Qualifications

- The composition of the team you propose to provide;
- Composition of a F2F team – how many fundraisers a team leader coordinating;
- Curriculum Vitae of core staff (maximum number of 8 CVs and 30 pages). CVs of fundraisers are not required;
- Indicate the minimum, maximum and average number of active teams and fundraisers in the last 12 months;
- Indicate average signup rate one fundraiser is able to acquire per day; and
- Indicate average monthly gift an active fundraiser is able to acquire.

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.

3.6 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions by signing this document (Annex E) 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.

1. Company Qualifications (20%)	<ul style="list-style-type: none"> • General liability/capacity of the company (5%) • Overall F2F fundraising experience/ time in business (including non-profit experience) (15%)
2. Proposed Services (40%)	<ul style="list-style-type: none"> • Comprehensiveness of proposal (5%) • Strategy of recruiting high quality donors and committed to make long-term monthly contributions based on the requirements listed (15%) • Current systems in place such as recruitment, training, database, design and material development, complaint handling etc. (10%) • Experience in indoor venue solicitation and setup (5%) • Quality and creativity of innovation proposed (5%)
3. Project staff (10%)	<ul style="list-style-type: none"> • Experience of core people who will work on project (including experience with similar projects, and not for profit/ UN experience)
Total:	70%

The minimum technical threshold is 42 points out of 70. Offers not reaching the minimum technical thresholds will be deemed technically non-compliant and will not proceed to the financial evaluation.

A conference will be held on 24 May 2018 at 11:00hrs Hong Kong Time in the office of UNHCR Hong Kong (Address: Room 911 Yau Ma Tei Carpark Bldg., 250 Shanghai Street, Kowloon, HK) to familiarize interested parties with the requirements. Representatives of interested parties are encouraged to attend and requested to confirm their presence. It is of utmost importance that **no financial information is disclosed** at this point of the process by either party.

4.2 Financial Evaluation

Your financial proposal is to be submitted on Annex B. Only this form can be used to providing pricing, fees etc. Please fill in the form as per instructions:

- Income and Cost proposal is to be conformed on sheet Financial Offer
- Cost is to be provided as total amount for the period indicated on sheet Financial offer
- It is mandatory to provide a detailed costs breakdown on sheet Cost breakdown

- Please describe your clawback/ monetary refund system in place (if any) on sheet Clawback
- Your financial offer can also be based on successful debits of donation with Donor Fee to be paid after PSP receives the donations

The **Financial offer** will use the following percentage distribution: **30%** from the total score

Financial proposals will be evaluated on the basis of the **Cost per Donor**

The maximum number of points will be allotted to the lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., [total Price Component] x [HKD lowest] \ [HKD other] = points for other supplier's Price Component.

4.3 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis

- Fulfill related requirements listed in Section 2;
- Average number of donors per month compared to target;
- Attrition rates;
- Average monthly donation;
- ROI;
- Cost per donor;
- Live Time Value forecast; and
- Number and gravity of complaints received about conduct of the fundraisers.

