



UNHCR

United Nations High Commissioner for Refugees
Haut Commissariat des Nations Unies pour les réfugiés

DATE: 09/05/2018

REQUEST FOR PROPOSAL: No. 2018/HCR/HKG/RFP/10087

**FOR THE ESTABLISHMENT
OF A FRAME AGREEMENT FOR THE PROVISION OF**

Face to Face Donor Recruitment Services in Hong Kong Special Administrative Region (Hong Kong SAR) and Macao Special Administrative Region (Macao SAR) of China for UNHCR Private Sector Partnerships

CLOSING DATE AND TIME: 27/06/2018 – 23:59hrs Hong Kong Time

INTRODUCTION TO UNHCR

The Office of the United Nations High Commissioner for Refugees was established on December 14, 1950 by the United Nations General Assembly. The agency is mandated to lead and co-ordinate international actions to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It also has a mandate to help stateless people.

In more than five decades, the agency has helped tens of millions of people restart their lives. Today, a staff of some 11,000 people in 130 countries continues to help and protect millions of refugees, returnees, internally displaced and stateless people. To help and protect some of the world's most vulnerable people in so many places and types of environment, UNHCR must purchase goods and services worldwide. For further information on UNHCR, its mandate and operations, please see <http://www.unhcr.org> or <http://www.unhcr.org/hk>

1. REQUIREMENTS

The Office of the United Nations High Commissioner for Refugees (UNHCR), Sub-Office Hong Kong, invites qualified service providers to make a firm offer for the establishment of Frame Agreement(s) for the provision of Face to Face (F2F) Donor Recruitment Services in Hong Kong Special Administrative Region and Macao Special Administrative Regions of the People's Republic of China.

IMPORTANT:

Terms of Reference (TORs) are detailed in Annex A of this document.

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.

The estimated requirement of UNHCR is detailed in Terms of Reference (TORs) – Annex A of this document.

Please note that figures have been stated in order to enable bidders to have an indication of the projected requirements. It does not represent a commitment that UNHCR will purchase a minimum quantity of services. Quantities may vary and will depend on the actual requirements and funds available regulated by issuance of individual Purchase Orders against the Frame Agreement.

Other United Nations Agencies, Funds and Programmes shall be entitled to the same prices and terms as those contained in the offers of the successful bidders and could form the basis for a Frame Agreement with other UN Agencies.

IMPORTANT:

When a Frame Agreement is awarded, either party can terminate the agreement only upon 90 days notice, in writing to the other party.

The initiation of conciliation or arbitral proceedings in accordance with **article 18** "settlement of disputes" of the UNHCR General Conditions of Contracts for provision of Services shall not be deemed to be a "cause" for or otherwise to be in itself a termination clause.

It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Sub-Contracting: Please take careful note of article 5 of the attached General Terms and Conditions (Annex D).

Note: this document is not construed in any way as an offer to contract with your firm.

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form integral part of this Request for Proposals:

- Annex A: Terms of Reference (TORs)
- Annex B: Financial Offer Form / **to be submitted**
- Annex C: Vendor Registration Form / **to be submitted**
- Annex D: UNHCR General Conditions of Contracts for the Provision of Services – 2010 / to be signed
- Annex E: UNHCR Special Data Protection Conditions / to be signed
- Annex F: RFP Checklist Form / **to be submitted**

2.2 ACKNOWLEDGMENT

Please acknowledge the receipt of this RFP by returning e-mail to chiho@unhcr.org as to:

- Your confirmation of receipt of this request for proposals
- Whether or not your representative(s) will attend the conference on 24 May 2018
- Whether or not you will be submitting a bid

2.3 REQUESTS FOR CLARIFICATION

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to the Secretary of the Committee on Contracts at chiho@unhcr.org. **The deadline for receipt of questions is 11:00hrs Hong Kong time on 23 May 2018.** Bidders are requested to keep all questions concise.

IMPORTANT:

Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than the submission e-mail address will result in disqualification of the offer. Please send your bid directly to the address provided in the "Submission of Bid" (section 2.6) of this RFP.

UNHCR will compile the questions received and will respond to these at the supplier conference. After the supplier conference, a Questions & Answers document will be prepared and posted on the UNHCR and UNGM website.

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 outmost importance that **no financial information is disclosed** at this point of the process by either party.

2.4 YOUR OFFER

Your offer shall be prepared in English.

Your offer shall comprise the following two sets of documents:

- Technical offer
- Financial offer*

*Only offers made in the format of form Annex B will be accepted

2.4.1 Content of the TECHNICAL OFFER**IMPORTANT:**

No pricing information should be included in the Technical offer. Failure to comply may risk disqualification. The technical offer should contain all information required.

The Terms of Reference (TORs) of the services requested by UNHCR can be found in **Annex A**. Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

- a) **Description of the company and the company's 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.

b) Understanding of the requirements for services, proposed approach, solutions, methodology and outputs

Any comments or suggestions on the TORs, as well as your detailed description of the manner in which your company would respond to the TORs:

- 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;
- A description of your experience in soliciting and setting up indoor venues. Please provide example(s);
- A description of current systems in place including but not limited to 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.

c) Proposed personnel to carry out the assignment

Please indicate the composition of the team (project managers, paid F2F staff, subcontractors, consultants) you propose to provide for the project. In particular:

- 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 specifying working experience/history). 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 day¹; and

¹ The daily average rate of completed monthly donation form that a fundraiser can solicit from the public

- Indicate average monthly donation an active fundraiser is able to acquire.
- d) **Vendor Registration Form:** If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (Annex C) along with your company certificate of business registration.
- e) **UNHCR General Conditions for Provision of Services:** Your technical offer should contain your acknowledgement of the UNHCR General Conditions for Provision of Services by signing Annex D.
- f) **UNHCR Special Data Protection Conditions:** Your technical offer should contain your acknowledgement of the UNHCR Special data protection conditions by signing Annex E.
- g) **RFP Checklist Form – Annex F:** Bidders is suggested to complete this form, sign it and return it as part of their Proposal submission. No alterations to its format shall be permitted and no substitutions shall be accepted. This form will help you to double-check if all mandatory information/ documents have been submitted.

2.4.2 Content of the FINANCIAL OFFER

Your separate **Financial Offer** must contain an overall offer for F2F donor recruitment services in Hong Kong SAR in a single currency, which shall be Hong Kong Dollar (HKD).

The financial offer must cover all the services to be provided (price “all inclusive”).

The Financial Offer is to be submitted as per the Financial Offer Form (Annex B). Bids that have a different price structure may not be accepted.

UNHCR is exempt from all direct taxes and customs duties. With this regards, price has to be given exclusive of all forms of tax.

You are requested to hold your offer valid for 120 days from the deadline for submission. UNHCR will make its best effort to select a company within this period. UNHCR's standard payment terms are within 30 days after satisfactory implementation and receipt of documents in order.

The cost of preparing proposals and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

2.5 PROPOSAL EVALUATION:

2.5.1 Supplier Registration:

The qualified supplier(s) will be added to the Vendor Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents. The investigation involves consideration of several factors such as:

- Financial standing;
- Core business;
- Track record; and
- Contract capacity.

2.5.2 Technical and Financial evaluation:

For the award of this project, UNHCR has established evaluation criteria which govern the selection of offers received. Evaluation is made on a technical and financial basis. The percentage assigned to each component is determined in advance as follows:

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%

IMPORTANT:

The technical offer will be evaluated using the criteria and percentage distribution: 70% from the total score. Bidder 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 **Financial offer** will use the following percentage distribution: **30%** from the total score.

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., $[\text{total Price Component}] \times [\text{HKD lowest}] \setminus [\text{HKD other}] = \text{points for other supplier's Price Component}$.

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**

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2.6 SUBMISSION OF BID:

The offers must bear your official letter head, clearly identifying your company.

Your proposal shall comprise the following documents:

- a) Technical Component
- b) Price Component, using the provided form

Bids should be submitted by e-mail and all attachments should be in PDF format. (Copied of the PDF format documents may, as an addition, be included in Excel or other formats etc.)

The Technical and Financial offers shall be **clearly separated**.

**Bid must be sent by e-mail ONLY to:
hkbids@unhcr.org**

IMPORTANT:

The technical offer and financial offer are to be sent in separate emails. Please DO NOT copy any UNHCR staff member on the submission emails. Failure to do so will result in disqualification

Deadline: 27/06/2018, 23:59hrs Hong Kong Time.

IMPORTANT:

Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

It is your responsibility to verify that all e-mails have been received properly before the deadline. Please be aware of the fact that the e-mail policy employed by UNHCR limits the size of attachments to a maximum of 18 Mb so it may be necessary to send more than one e-mail for the whole submission.

Please indicate in e-mail subject field (each of the email sent):

- 2018/HCR/HKG/RFP/10087
- Name of your firm with title of the attachment
- Clearly state if the email contains the financial or technical part of your offer (to be submitted separately)
- Number of e-mails that are sent (example: 1/3, 2/3, 3/3).

UNHCR will not be responsible for locating or securing any information that is not identified in the bid. Accordingly, to ensure that sufficient information is available, the bidder shall furnish, as part of the bid, any descriptive material such as extracts, descriptions, and other necessary information it deems would enhance the comprehension of its offer.

2.7 BID ACCEPTANCE:

UNHCR reserves the right to accept the whole or part of your bid.

UNHCR may at its discretion increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the rate submitted. Any such increase or decrease in the contract duration would be negotiated with the successful bidder as part of the finalization of the Purchase Orders for Services.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a

modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs, as well as conforming to UNHCR's general principles, including economy and efficiency and best value for money.

2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

Any Purchase Order (PO) issued as a result of this RFP will be made in the currency of the winning offer(s). Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

2.9 UNHCR GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES

Please note that the General Conditions of Contracts (**Annex D**) will be strictly adhered to for the purpose of any future contract. The Bidder must confirm the acceptance of these terms and conditions in writing.



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