

Annex A: Terms of Reference
RFP/THA/2018/005
FOR THE PROVISION OF FACE TO FACE DONOR RECRUITMENT SERVICES IN
THAILAND

Bidders are required to submit any request for clarification or any question in respect of this TOR by e-mail to pongpani@unhcr.org. The deadline for receipt of questions is **20 June 2018**.

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) in Thailand raises awareness on refugee issues and asks individuals to financially support UNHCR's activities through professional face-to-face (F2F) interactions with members of the public. This has been done since May 2008 as part of a global UNHCR strategy of awareness raising and increasing private sector funding.

Since 2008 these fundraising services for Thailand have been supplied by an external service provider which raised over 1,000 million Baht (31 million \$US) and acquired over 70,000 donors as of the end of 2017. Funds raised from Thai public have been spent for refugees in Thailand and the world.

Thailand attracts more F2F fundraising players as the market see potential with about 1 million credit card users in the country. UNHCR's Private Sector Partnerships Service (PSP) estimates the market potential for UNHCR in Thailand at 9,000 new donors per year.

UNHCR reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the UNHCR's best interest to do so.

1.2 Statement of Purpose & Objectives

In order to achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR PSP Thailand is seeking to enter into Frame Agreement (FA) for donor acquisition/recruitment services with service providers specialized in such service areas.

The FA will be signed with the successful bidder(s) for an initial period of twelve (12) months (Phase 1) and will be extended at the sole discretion of UNHCR for additional ten (10) months (Phase 2), upon satisfactory evaluation of performance each year:

Phase 1: September 2018 to September 2019 (12 months)

Phase 2: September 2019 to June 2020 (10 months)

PSP Thailand may contract more than one service provider. The proposed fees are to be maintain for the duration of the contract.

Operational goals:

- To reach a return on investment (ROI) of 1.1:1 within 12 months for Phase 1, and a ROI of 1:1 for Phase 2
- To acquire at least 584 net donors per month during Phase 1 and at least 667 net donors per month during Phase 2.
- Minimum acceptable monthly donation / pledge must be 400 Baht.

Please note that these figures for the number of donors recruited is based on UNHCR PSP benchmarking exercise and annual plan. Vendors are requested to prepare their bids based on their **maximum** but **realistic** capacity/availability even the capacity is lower than the set figures confirmed above.

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2 Requirements

2.1 Face-to-Face donors recruitment services

2.1.1 F2F event

Conduct the face-to-face fundraising campaigns at event, businesses, and targeted public sites to solicit regular giving (i.e. monthly, every six months) donations. (Please see specifications in requirements below).

2.1.2 Collect 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.

2.1.3 Deployment

Contractor(s) will be required to deploy at the request of UNHCR team(s) of suitable competent persons with relevant expertise, (hereinafter referred to as "Fundraisers", "Branch Manager" and "Team Leader") to perform the face-to-face donor acquisition services. Fundraisers representing UNHCR on average are 30 people per month.

- Contractor(s) will be required to mobilise sufficient numbers of operation support staff to provide the services.
 - One (1) Branch Manager to:
 - Assist in conducting feasibility studies
 - Train and motivate junior personnel (Fundraisers) in all aspects of fundraising
 - Create fundraising plans and help implement and evaluate those plans; and
- Team Leaders to:
 - Participate in the development of strategies and proposals and the implementation of the same to recruit individual donors, in the form of regular monthly givers.
- The Contractor(s) will be required to identify Operation Manager(s) to:
 - Serve as a focal point to oversee the effective implementation of the F2F programme.

2.1.4 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

2.1.5 Staff Administration

- Monitors the attendance, performance and conduct of staff involved in the UNHCR face-to-face programme

2.1.6 Logistics Arrangement that Supports the F2F Operation

- Plans and applies for locations for all face-to-face teams
- Prepares and submits face-to-face operation proposals to UNHCR for consideration and approval

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- Prepares and submits applications to obtain approval and all relevant permits from all concerned parties
- Coordinates, produces and manages the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners, fundraising booth and uniforms to support the face-to-face programme at the predefined locations
- Provides identification badges and presentation materials for the face-to-face program staff
- In order to avoid paying site fees, UNHCR will assist in securing free site locations
- The contractor will pay for event locations which are not provided free of charge
- 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.

2.1.7 Control and Submission of Donation Forms

- Ensures each donation form should carry a unique serial number and should be strictly controlled by the Contractor
- Manages all donation forms so that they are accounted for at all times (for at least 18 months after sign up according to banking laws in Thailand)
- Ensures that donation forms are accurately completed and signed by the donors
- Ensures that all completed or voided donation forms are kept confidentially and then destroyed 18 months after sign up date according to the banking laws of Thailand.

2.1.8 Training

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

2.1.9 Motivation

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

2.1.10 Performance Assessment

- Conducts daily performance assessments of fundraisers by team leader(s)
- Conducts daily and weekly performance assessments of team leader by operation manager(s)
- Conducts regular on-site supervision by operation manager(s)

2.1.11 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 donations, including but not limited to cash and gift
- 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's face-to-face programme

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2.1.12 Reporting

- Prepares and submits monthly and weekly location plans for all face-to-face teams
- Informs UNHCR any change of location as early as possible
- Prepares and submits weekly and monthly reports of donor acquisition results
- Provides verbal reports of any misconduct or complaint received 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 to UNHCR within 3 (three) working days
- Appoints a professional "mystery shopping" company to carry out anonymous "mystery shopping" at all sites at least once per month and provides mystery shopping reports to UNHCR on a monthly basis.

2.2 Considerations

The UN Refugee Agency offers the following expected parameters to be considered when preparing your proposal.

- Minimum objective is 584 new donors per month for Phase 1
- Minimum objective is 667 new donors per month for Phase 2
- Monthly donations / pledges may be set up by direct debit or credit card (Visa/MasterCard/American Express)
- Minimum acceptable monthly donation / pledge must be 400 Baht.
- Fundraisers cannot accept gifts on the street.
- No cash gifts can be received by the fundraisers.
- Budget allocation cannot be revealed by UNHCR at this point of time, but will be disclosed to the chosen supplier after the RFP.

Our expectation is to view proposals that are designed to reach a ROI of 1.1:1 for Phase 1 based on:

- the required number of new donors to acquire per phase and per year
- the average value of a donor on a monthly basis
- an estimation of donor attrition (% of donors who stop their donations during the first 12 months, by evaluating at the 3, 6 and 12 month mark).

Our expectation is to view proposals that are designed to reach the minimum number of donors to acquire per phase based on:

- number of fundraisers
- number of teams
- number of locations/venues per month
- number of cities where the programme will be run.

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3 Customer Responsibilities

The UNHCR is responsible for providing the following:

- Designing, printing and delivering acquisition material (e.g. pitch cards, leaflets, donation forms, banners, uniforms, welcome packages)
- Liaising with the Contractor, attends regular project management calls and meetings
- Reconciling reports submitted by the Contractor with UNHCR database reports
- Providing the income processing platform

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4 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:

4.1 Company Qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including:
 - Company profile
 - Registration certificate
 - Last one year audit report
 - Year founded
 - Proven eligibility to work in Thailand
- 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;
- Number of similar projects currently underway;
- Presence in the country
- 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 Thailand or other UN Agencies. If submitting a partnership proposal, please provide references for each firm that is participating in the proposal bid.

4.2 Proposed Services

- A description of the fundraising plan for Phases 1 and 2 and a description of the services offered, in tandem with other partners, third party suppliers, contractors (if applicable)
- A description of current systems in place

4.3 Personnel Qualifications

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

1. Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TOR;
2. Describe their experience and expertise in working with UN / International organizations;

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4.4 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).

4.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

4.6 Applicable Special Data Protection Conditions

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

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5 Evaluation

5.1 Technical evaluation recruitment services

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70% (on a 100 points scale, i.e. 70 points max)** from the total score. This applies for both recruitment & retention services.

1. Company Qualifications (10 points)
General Liability / Capacity of the Company (max 5 points)
Overall F2F fundraising experience/time in business (max 5 points)
2. Proposed Services (40 points)
Comprehensiveness of proposal (max 5 points)
Quality/clarity of interpreting and presenting F2F fundraising services in order to recruit high quality donors and committed to make long-term monthly contribution (max 25 points)
Experience of completing similar projects (or currently in progress) internationally/Thailand (max 10 points)
3. Personnel Qualifications (20 points)
Experience of core people who will work on UNHCR project. (Including experience with similar projects) (max 20 points)

The minimum passing scores of the evaluation is 40 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

The technical proposal cannot contain any fees or pricing information. Failure to comply with this requirement will result in disqualification.

5.2 Financial evaluation

The max score allocated to the financial components is 30% (of the total scores), i.e. max 30 points. The financial proposal is to be submitted **ONLY** by filling in Annex B. No other format will be accepted. The financial comparison and ranking will be based on cost per acquisition (CPA).

Bidders must indicate on Annex B:

- Minimum amount of donors the agency has the capacity to recruit
- Pre-debit attrition expressed in %
- Average 3, 6 and 12 month's attrition
- Average monthly donation
- Total cost
- Program details

Please confirm the clawback, or monetary refund system, if any.

Please also be noted that PSP Thailand only pays for donors who have successfully transferred their first payments, and this payment system shall remain unchanged in the future.

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6 Key Performance Indicators

6.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier on a monthly basis according to the following KPIs:

- Average monthly donation
- Average donors per month
- Attrition rates
- ROI
- Cost per donor