



2019/HCR/HKG/RFP/001

Annex A: Terms of Reference

Face to Face Donor Acquisition Services
in Hong Kong SAR and Macao SAR of China



Bidders are required to submit any request for clarification or any question in respect of this ToR by email to Erzsebet Galgaler@unhcr.org. The deadline for receipt of questions is 20 November 2019 23:59 pm hrs Hong Kong time.

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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.

The Private Sector Partnerships (PSP) of the United Nations High Commissioner for Refugees (UNHCR) 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. F2F consistently adopted the LTV principles of soliciting an optimal monthly gift and purposively approaching market segments capable of giving for the long term. This best practice shall continue to maintain a low cost per donor and a reasonable 12-month ROI.

UNHCR Sub-office Hong Kong seeks to grow its F2F operation in collaboration with service providers to expand its reach in Hong Kong and Macao SARs.

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 Frame Agreement (FA) for F2F donor acquisition services with specialized agencies in such area.

The Frame Agreement will be signed with one or more successful bidders for an initial period of nine (9) months and will be extended at the sole discretion of UNHCR for additional twelve (12) months, upon satisfactory performance:

- Phase 1: 1 April 2020 to 31 December 2020 (9-months period)
- Phase 2: 1 January 2021 to 31 December 2021 (12-months period)

In UNHCR's acquisition strategy, both quantity as well as quality is of high importance, meaning UNHCR is not only aiming for volume, but for committed donors with high lifetime value (LTV) too.

UNHCR expects to achieve the following targets:

- Phase 1: 2,000 new donors for the period of 1 April 2020 until 31 December 2020
- Phase 2: 4,500 new donors for the period of 1 January 2021 until 31 December 2021
- Average monthly donation is HKD 250
 - Attrition of maximum 25% (cumulative) over a 12-month period after acquisition
 - Cumulative Return on Investment (ROI):
 - Year 1: 0.8
 - Year 2: 1.5



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- Year 3: 2.2
- Fundraisers cannot accept gifts on the street. No cash gifts can be received by the fundraisers.

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

- Number of fundraisers
- Number of teams
- Number of locations/venues per month

Bidders are requested to include all the above information into their proposal. Please note that these figures are 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 if it is lower or higher than the set figures.



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2 Requirements

2.1 F2F donor acquisition services

The Contractor will need to deliver the following:

2.1.1 F2F donor acquisition

Conduct F2F fundraising campaigns at events, businesses, and targeted public sites (street) to solicit regular giving (i.e. monthly) donations.

2.1.2 Collect donation

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 will be required to deploy at the request of UNHCR team(s) of suitable competent persons with relevant expertise (hereinafter referred to as "Fundraisers", "Team Leader" and "Project Manager") to perform the F2F services.

- **Project Manager to:**
 - Serve as a focal point to oversee the effective implementation of the F2F programme;
 - 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.
- **Team Leader to:**
 - Lead a team of Fundraisers during their daily operation
- Contractor(s) will be required to mobilise sufficient numbers of operation support staff to provide the services.
- **Deployment to Macao SAR**
 - Deploy a maximum of eight (8) fundraisers to travel to Macao SAR for 2 day and 1 night 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
- Any adjustment on the number of target donors to be acquired, it shall be mutually agreed by UNHCR and the Contractor prior to the execution of the contract and subject to revision every six (6) months.



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2.1.4 Staff administration

- **Recruitment of Staff**
 - Plan and coordinate the recruitment of highly competent staff 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 fundraising services; and
 - Ensure payment of the fundraisers conform to the local legislations.
- **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 project manager(s); and
 - Conduct regular on-site supervision by appropriate 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 fundraising services.

2.1.5 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;



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- 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 to produce 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 fundraising services;
 - Provide marketing materials including but not limited to identification badges, tables, chairs and presentation folders for the F2F fundraising 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 always be accounted for;
 - 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.

2.1.6 Report

- 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 regarding 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 meetings with UNHCR.



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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).

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4 Content of the Technical Offer

Pre-selection criteria (mandatory to fulfil with this criteria):

In order to be eligible to participate at this bidding, your company must be registered in Hong Kong SAR and to be able to do business in Hong Kong SAR. In order to establish compliance with this criteria, Copy of Certificate of Business Registration/ Certificate of Incorporation are to be sent. Failure to comply with this pre-selection requirement, will result in disqualification. Only offers compliant with this Yes or No criteria will be considered for evaluation.

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.

4.1 Company Qualifications

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score your company's (1) general liability and (2) F2F service provision experience in the non-profit sector:

- A description of your company with evidence of your company's capacity to perform the services required, including:
 - Last audit reports, last balance sheet or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company's financial soundness and stability;
 - 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 non-profit sector for donor acquisition services;
- Total number of clients, please provide a list; and
- Please provide three references (reference letter, email address and contact person) from your current/previous clients, UNHCR will contact in case of selection.

4.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) the comprehensiveness of the proposal, (2) your company's compliance regarding the required services listed in ToR and the capacity to achieve the proposed targets and (3) any innovative idea or strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate:

- The comprehensives of the proposal, whether the proposal follows the structure of this ToR. General company profile will not be accepted;
- A description of your agency's capacity to provide the service in the ToR;



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- A description of your agency's strategy to how to achieve the proposed targets listed under point 1.2 of Annex A;
- A description of your agency's compliance with all requirements listed under point 2 of Annex A;
- Any innovative idea or strategy to acquire quality, long-term committed donors and reduce the attrition rates.

4.3 Personnel Qualifications

During the technical evaluation, in this section, the panel will score the experience of the core people who will work on UNHCR project (based on the number of years and demonstration expertise in the area):

- Please indicate the composition of the team (project managers, paid F2F staff, subcontractors, consultants) you propose to provide the project;
- Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the ToR; and
- Describe their experience and expertise in working in the charity sector.

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 by signing this document (Annex D) and including it in your submitted Technical Proposal.

4.6 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.

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5 Evaluation

5.1 Technical Evaluation

Pre-selection criteria (mandatory to fulfil with this criteria):

In order to be eligible to participate at this bidding, your company must be registered in Hong Kong SAR and to be able to do business in Hong Kong SAR. In order to establish compliance with this criteria, Copy of Certificate of Business Registration/ Certificate of Incorporation are to be sent. Failure to comply with this pre-selection requirement, will result in disqualification. Only offers compliant with this Yes or No criteria will be considered for evaluation.

Only offers fulfilling the pre-selection criteria will be further evaluated technically.

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.

Company Qualifications (max 15 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (5 points)	Please submit last balance sheet, last year audit reports OR any financial statement, public audit, risk scores given by qualified companies are provided to enable UNHCR to assess financial soundness and stability.
F2F fundraising experience/time in non-profit sector (10 points)	The scores will be allocated for experience/time in the non-profit sector (i.e. charity), based on the evidence provided. Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted <u>in case of selection</u> .
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Comprehensiveness of proposal (5 points)	Please follow the structure of requirements listed under point 2 to ease the scoring. General company profile will not be accepted as technical proposal. Please tailor your offer to demonstrate compliance with the listed requirements.
Compliance with the general requirements listed under 2 (15 points)	A detailed section on the technical proposal to prove your agency's compliance with the general requirements listed under point 2.
The capacity and strategy to achieve the proposed results listed under section 1.2 (15 points)	Clear description on the maximum, realistic capacity/availability and detailed strategy proposed to achieve targets.
Any innovative idea, strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate	Comprehensive strategy to be presented to acquire quality, long-term committed high life-time value donors and reduce the attrition rate



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(5 points)	
Personnel Qualifications (max 15 points)	Documents, information to be provided to establish compliance with the set criteria
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.

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.

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 maximum number of points will be allotted to the lowest price offer (cost per donor) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

Every other criterion requested will be evaluated to consider the accuracy of the price offer by the Contractor(s):

- Cost per donor for acquisition (if applicable: cost per different age group);
- Average monthly donation expected;
- Cumulative 12-month ROI;
- Pre-debit attrition;
- Attrition at 3, 6 and 12 months;
- Clawback (please indicate your proposed monetary refund system in place). The clawback calculation will be included into the cost and has impact on the final Cost per Donor figures, used for ranking;
- Your financial offer can also be prepared based on successful debits of donation with Donor Fee to be paid after PSP receive donations with successful debits.

The financial ranking will be based on the CPD (Cost per door, i.e. donor acquisition cost) for newly hired donors. Please indicate your maximum and realistic capacity in terms of donor number and different attrition rates.

- TAB 1: please fill out yellow cells for attrition & income & cost
- TAB 2: it is mandatory to provide breakdown for the cost
- TAB 3: it is mandatory to provide 12-month cumulative income & ROI calculation
- TAB 4: it is mandatory to provide detailed clawback calculation



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5.3 Performance Evaluation

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

- Average monthly donation
- Average donors per month
- Attrition rates
- Return on Investment (ROI)
- Cost per donor