

**DATE: 1<sup>st</sup> of November 2019**

**REQUEST FOR PROPOSAL: No.**

**2019/HCR/HKG/RFP/001**

**FOR THE PROVISION OF**

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

**CLOSING DATE AND TIME: 13<sup>th</sup> of December 2019 (23:59 Hong Kong time)**

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## **INTRODUCTION TO UNHCR**

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. REQUIREMENTS**

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
- ✓ 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.

## **2. BIDDING INFORMATION:**

### **2.1. RFP DOCUMENTS**

The following annexes form an integral part of this Invitation to Bid:

- Annex A: Terms of Reference (ToR)
- Annex B: Financial Offer Forms
- Annex C: Vendor Registration Form
- Annex D: UNHCR General Terms & Conditions
- Annex E: UNHCR Special Data Protection Conditions

### **2.2 ACKNOWLEDGMENT**

We would appreciate your informing us of the receipt of this RFP by return e-mail to Erzsebet Gal, [galer@unhcr.org](mailto:galer@unhcr.org) as to:

- Your confirmation of receipt of this invitation to bid
- 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 Erzsebet Gal at [galer@unhcr.org](mailto:galer@unhcr.org). The deadline for receipt of questions is the **20<sup>th</sup> of November 2019 (23:59 pm HK time)**. Bidders are requested to keep all questions concise.

UNHCR will compile the questions received and the corresponding Q&A file will be posted and sent to all bidders.

### **2.4 YOUR OFFER**

Your offer shall comprise the following two sets of documents:

1. Technical offer
2. Financial offer

#### **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.

**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.**

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) Company qualification**

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.

**b) 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;
- 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.

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**c) Personnel qualification**

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.
- 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);
- e) Please indicate your acknowledgement of the **UNHCR General Conditions of Contract for the Provision of Services (Annex D)** and include it in your submitted Technical Proposal.
- f) Please indicate your acknowledgement of the **UNHCR Special Data Protection Conditions (Annex E)** and include it in your submitted Technical Proposal.

#### **2.4.2 Content of the FINANCIAL OFFER**

Your separate **Financial Offer** must contain an overall offer in a single currency, which shall

be EUR. 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.

You are requested to hold your offer valid for 90 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 a bid 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 BID 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;
- Contract capacity.

##### **2.5.2 Technical and Financial 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% from the total score (on a 100 points scale, i.e. max 70 points obtainable for the technical offer). Please find hereunder the detailed scoring breakdown.

### **Technical evaluation**

<b>Company Qualifications (max 15 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
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> .
<b>Proposed Services (max 40 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
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 (5 points)	Comprehensive strategy to be presented to acquire quality, long-term committed high life-time value donors and reduce the attrition rate
<b>Personnel Qualifications (max 15 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
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.

### **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 donor, 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

## 2.6 SUBMISSION OF BID:

The offers must bear your official letter head, clearly identifying your company. Please send the technical and financial proposal in separate email.

Bids should be submitted by e-mail and all attachments should be in PDF format. Please submit the financial offer (Annex B) in both excel and PDF format, for reading and evaluation purposes.

**Bid must be sent by e-mail ONLY to: [DENCOBID@unhcr.org](mailto:DENCOBID@unhcr.org)  
by the 13<sup>th</sup> of December 2019 23:59 pm Hong Kong time**

**IMPORTANT:** The technical offer and financial offer are to be sent in separate documents. Please do NOT copy any UNHCR staff member on your bid submission, as the bid opening and registration is done by a third, independent team. Failure to do so will result in disqualification.

**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

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 **5 MB**, so it may be necessary to send more than one e-mail for the whole submission, to send in a compressed file or to send a link to an online file storage modality.

Please indicate in e-mail subject field:

- **2019/HCR/HKG/RFP/001**
- Name of your firm with the title of the attachment
- If your email includes the technical or the financial offer (they are to be sent in separate emails)
- Number of e-mails that are sent (example: 1/3, 2/3, 3/3).
- Please send the technical and financial proposal in separate email.

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.

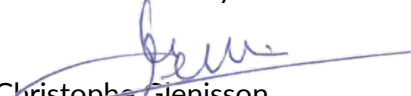
**2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS**

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 UN GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES**

Please note that the General Conditions of Contracts for the Provision of Services (**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.

Yours faithfully



Christophe Gienisson  
Regional Manager PSP Asia

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