



UNHCR

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

Annex A **TERMS OF REFERENCE**

RFP/THA/2017/004 **Face-to-Face Donors Recruitment and Retention services**

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 940 million Baht (26 million \$US) and acquired over 66,000 donors as of the end of 2016. Funds raised from Thai public have been spent for refugees in Thailand.

In 2016, 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. UNHCR expects the winner (s) of this RFP to be able to provide the service from 1st July 2017 onwards.

2. Objectives of the RFP

In order to achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR is seeking to enter into Frame Agreement (FA) for the maximum period of thirty six (36) months for donor acquisition services with Contractor(s) 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 twenty four (24) months (Phase 2), upon satisfactory evaluation of performance each year. The initial period for Phase 1 shall be 1 July 2017 until 30 June 2018. The Phase 2 will cover the period 1 July 2018 until 30 June 2020.

Our expectation is 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. Proposals must reflect this.

3. Scope of Services (both phases)

The contractor will need to deliver the following:

- A) Face-to-Face Donors Recruitment Services
And / or
B) Face-to-Face Donors Retention Services (for donors acquired in A)

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).

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(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.

We expect:

- A) 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
- b) 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.
- c) 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.

Contractor(s) will be required to mobilise sufficient numbers of operation support staff to provide the services.

The Contractor(s) target is to acquire at least 584 net donors per month during Phase 1 and at least 667 net donors per month during Phase 2. Detailed requirements are in the Financial Offer (Annex B1 and B2).

Any adjustment on the number of target donors to be acquired shall be mutually agreed by UNHCR and the Contractor prior to the execution of the LTA and subject to revision every six (6) months.

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

3. A1. 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

3.A2. Staff Administration

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

3.A3. 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
- 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.

3.A4 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.

3.A5 Training

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

3.A6. Motivation

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

3.A7. 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)

3.A8. 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

3.A9. 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.

3. B) F2F Fundraising Retention Services

Conduct the fundraising communication campaigns towards new donors recruited in Part A during Phase 1 and Phase 2.

For new and active donors within the first 12 months, this should include:

- A) Data entry and daily processing: Including registering forms and transferring the data electronically through UNHCR's existing bank, re-process all items "Unrealised Donors" (donors that have been rejected by bank due to no fund or incorrect data), and provide weekly summary report to UNHCR.
- B) Process the debiting of the donor credit cards and bank accounts every month with at least two (2) processing attempts. Provide monthly detailed reporting in order to be able to do reconciliations and fundraising analysis (donation report, financial report, attrition report and customer service report).
- C) Process the debiting of the donor credit cards and bank accounts with a total of six (6) processing attempts before the donor can be archived as "Rejected".
- D) Welcome packages: Developing (with UNHCR) a welcome package (letter and donor guide flyer), laser printing, packaging, letter shopping (labelling) and mailing
- E) Welcome calls: to verify donors' commitment and details (approximately 10 mins./per call) + welcome SMS/MMS
- F) Design, printing and delivery of donor care materials to donors during Year 1 including a mailed Welcome Pack, a quarterly newsletter (12 A4 pages in 4 colours), up to eight (8) electronic direct mails and a printed donor summary of donation receipt.
- G) Upgrade, conversion and reactivation calls to donors
- H) Inbound call services.

For active donors after the first 12 months, communication and work plan should include A, B, F, G and H. All plans and materials will be subject to sign off and approval from UNHCR

4. UNHCR Parameters / Considerations:

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

- Minimum objective is five hundred eighty four (584) new donors per month, meaning seven thousand (7,000) for the twelve month Phase 1 (1 July 2017 until 30 June 2018).
- Minimum objective for the roll out period (Phase 2) is six hundred sixty seven (667) new donors per month, meaning sixteen thousand (16,000) new donors for the period from 1 July 2018 until 30 June 2020

- 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.

5. Minimum requirements: Minimum requirements to participate in this RFP are **a)** proven track record with F2F activities in Thai marketplace; and **b)** the bidder's proven eligibility to work in Thailand.

All license/ permission costs to be borne by supplier.