

2017/HCR/HKG/RFP/10009

Annex A: Terms of Reference

Face to Face Fundraising Services in Hong Kong SAR of China

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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.

UNHCR has been running successful face to face fundraising since 2007 and is a proven method of generating funds for UNHCR. As part of the global UNHCR strategy we want to increase our fundraising efforts in Hong Kong in 2017 and the following years through face to face fundraising. The office is now opening this RFP in order to have additional capacity in face to face fundraising services in Hong Kong with the winner of this RFP.

UNHCR expects the winner(s) of this RFP to be able to provide services starting no earlier than June 2017.

## 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 service agreement for the maximum period of twelve (12) months for donor acquisition in Hong Kong SAR and other F2F-related supporting services with Contractor specialized in such service areas.

The agreement 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 six (6) months (Phase 2), upon satisfactory evaluation of performance. UNHCR expects the winner of this RFP will provide services starting no earlier than June 2017.

The initial period for Phase 1 is tentatively planned to start on 1 July 2017 until 30 June 2018, potentially extendable for a further period of 6 (six) months from 1 July 2018 to 31 December 2018.

UNHCR expects to achieve the following Return On Investments (ROI):

Year 1: 0.7

Year 2: 1.5

Year 3: 2.2

UNHCR offers the following expected parameters to be considered when preparing your proposal:

- Minimum objective Phase 1 is 1000 new donors in twelve (12) months and Phase 2 is 600 new donors in another six (6) months, so in total 1,600 new donors in 18 months;
- Minimum acceptable monthly donation Monthly donation must be at least HKD100 per month;

- Donations and pledges are to be factored into the technical and financial proposals in the following terms:
  - o Pledge: A potential new donor has been signed up by a F2F fundraiser – a donor form for a monthly donation is completed. It will remain a pledge until the 1<sup>st</sup> donation is processed and confirmed by UNHCR's donation processing platform;
  - o Donor: A donor who has made at least 1 successful donation (donation has been successfully confirmed by the UNHCR's donation processing platform).
- Attritions are to be estimated and factored into the technical and financial proposals in the following terms
  - o Pre-debit attrition: % of pledges that do not convert into donors because the 1<sup>st</sup> donation is not processed successfully
  - o 3 month attrition: % of donor who stop their donations after three months;
  - o 6 month attrition: % of donor who stop their donations after six months;
  - o 12 month attrition: % of donor who stop their donations after 1 year
- Our expectation is to view proposals that are designed to reach a minimum return on investment of 0.7:1 within 12 months based on:
  - o Total Income (factoring attritions)
  - o Total cost
- Financial proposals will be evaluated on the basis of **the cost per donor**.



## 2 Requirements

### 2.1 Face to Face Fundraising Services in Hong Kong SAR

The Contractor will need to deliver the following:

- Conduct F2F fundraising campaigns at events, businesses, and targeted public sites (street) to solicit regular giving (i.e. monthly) 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.
- 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" and "Team Leader") to perform the F2F services.
- At least one (1) Team Leader to :
  - Assist in conducting feasibility studies;
  - Train and motivate junior personnel (Fundraisers) in all aspects fundraising; and
  - Create fundraising plans and implement and evaluate those plans.
- At least three (3) junior personnel (Fundraiser) to:
  - Execute the strategies and proposals to recruit individual donors in the form of regular monthly givers.
- 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 mobilize sufficient numbers of operation support staff to provide the service.
- The Contractor(s) target is to acquire at least 1000 donors in Phase 1 (12 months) and at least 600 donors in Phase 2 (6 months).
- Any adjustment on the number of target donors to be acquired shall be mutually agreed by both UNHCR and the Contractor prior to the execution of the contract and subject to revision every six (6) months

### 2.2 Other services, required for the performance of the key requirements

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

#### 2.2.1 Recruitment of Staff

- Plans and coordinates the recruitment of highly competent staff to effectively perform the activities as required under the UNHCR F2F programme.

#### 2.2.2 Staff Administration

- Provision of, including but not limited to, employment contract, insurance coverage, remuneration, retirement benefits, and other benefits to staff members who have been recruited to support the F2F programmes. Contractor must ensure employee

benefits and compensation arrangements comply with the local legislation in Hong Kong SAR of China;

- Monitors the attendance, performance and conduct of staff who are involved in the UNHCR F2F fundraising services.

#### 2.2.3 Logistics Arrangement that Supports the F2F Operation

- Plans and applies for locations for all F2F teams;
- Obtains 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;
- Prepares and submits operation proposals to UNHCR for consideration and approval;
- Prepares and submits applications to obtain approval and all relevant permits from all concerned government agencies;
- Manage the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners and uniforms to support the F2F fundraising services;
- Provides marketing materials including but not limited to identification badges, tables, chairs and presentation materials for the F2F fundraising services;
- Sets up and coordinates the backend process if using electronic devices for presentation and sign-up;
- 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.

#### 2.2.4 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 be accounted for at all times;
- Donation forms should be assigned to Fundraisers with records and are all returned to the Team Leader or the Contractor daily;
- Ensures that donation forms are accurately completed and signed by the donors;
- Ensures that all completed or voided donation forms are returned to UNHCR within five (5) working days.

#### 2.2.5 Training

- Provides induction training to all newly recruited F2F fundraisers;
- Provides regular training for all fundraisers;
- Provides special training for team leaders;

#### 2.2.6 Motivation

- Plans, develops and maintains motivation schemes as deemed appropriate;

- Prepares and submits proposal for motivation schemes to UNHCR for consideration and approval;
- All incentives for motivation schemes should be covered in your financial proposals (price “all inclusive”).

#### 2.2.7 Performance Assessment

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

#### 2.2.8 Monitoring Staff Conduct

- Ensures that no F2F programme staff engages in any misleading or deceptive conduct;
- Ensures that apart from completing the donation forms no F2F programme staff accepts any form of donations including but not limited to cash and gifts;
- Ensures that no F2F 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 F2F fundraising services.

#### 2.2.9 Analysis and Reporting

- Prepares and submits monthly location plans for all F2F teams;
- Informs UNHCR of any change of location within the same day;
- Prepares and submits bi-weekly and monthly reports of F2F results;
- 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;
- Provides reports to analyze the performance of testing strategies and introduction of new measures;
- Provides a verbal report of any misconduct or complaint received in regard to 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 face to face meetings with UNHCR.

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### **2.3 Customer Responsibilities**

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UNHCR is responsible for providing the following:

- Designing and printing acquisition materials including pitch cards, leaflets, donation forms, uniforms, lanyards and banners;

- 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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### 3 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:

#### 3.1 Company Qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including:
  - Company profile, registration certificate and last audit reports
- If a multi-location company, please specify the location of the company's headquarters, and the branches in Hong Kong 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 of F2F fundraising services or donor acquisition;
- Number of similar projects currently services in Hong Kong as well as elsewhere and their identities;
- Any relevant experience working with UNHCR Hong Kong, other UN Agencies and NGOs should be included;
- Total number of existing clients, please provide a list;
- Three or more letters of reference or client testimonials, with contact information; and
- Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

#### 3.2 Proposed Services

- 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);
- A description of current systems in place such as recruitment, training, database, design and material development, complaint handling mechanism;
- Outline of strategy for recruiting high quality donors and committed to make long-term monthly contributions;
- A description of your experience in soliciting and setting up indoor venues. Please provide example(s);
- A description of reports and key performance indicators (KPIs) that will be used to measure the services offered; and
- Any other services offered that bring value to F2F service.

#### 3.3 Personnel Qualifications

- The composition of the team you propose to provide;
- Curriculum Vitae of core staff (maximum number of 8 CVs and 30 pages)

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### ***3.4 Vendor Registration Form***

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If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C).

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### ***3.5 Applicable General Conditions***

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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.

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### ***3.6 Special Data Protection Conditions***

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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.



## 4 Evaluation

### 4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: 70% from the total score.

1. Company Qualifications (15%)	<ul style="list-style-type: none"> <li>• General liability/capacity of the company (5%)</li> <li>• Overall F2F fundraising experience/ time in business (5%)</li> <li>• Presence and experience in the Hong Kong market (5%)</li> </ul>
2. Proposed Services (35%)	<ul style="list-style-type: none"> <li>• Comprehensiveness of proposal (5%)</li> <li>• Clarity interpreting and presenting F2F services (5%)</li> <li>• Current systems in place such as recruitment, training, database, design and material development, complaint handling, etc (5%)</li> <li>• Strategy of recruiting high quality donors and committed to make long-term monthly contributions (5%)</li> <li>• Experience in indoor venue solicitation and settings (5%)</li> <li>• Quantifying results - Reporting/ Key Performance Indicators Capacity to provide all described services (5%)</li> <li>• Quality/ creativity of all other services offered, including working with other 3rd party suppliers (5%)</li> </ul>
3. Project staff (20%)	Experience of core people who will work on project (including experience with similar projects, and not for profit/ UN experience)
Total:	70%

The minimum technical threshold is 42 points out of 70. Offers not reaching the minimum technical thresholds will be deemed technically non-compliant and will not proceed to the financial evaluation.



## 5 Key Performance Indicators

### 5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier.

- Fulfill related requirements listed in Section 2
- Minimum acceptable monthly donation/ pledge must be HKD100;
- 12 month Return On Investment (ROI) should aim at 0.7 or above for F2F fundraising services;
- Monthly donations / pledges may be set up by credit card or direct debit. Use of credit card is preferred
- Currently, all regular donations are collected on a monthly basis, but UNHCR reserve the right to test quarterly, 6-monthly and annual donations in the future
- Fundraisers are expected to recruit monthly donors who are committed to make long-term monthly contributions to UNHCR
- Fundraisers cannot accept cash gifts on-site. 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 successful offeror(s)

Our expectation is to view proposals that are designed to reach a 12 month ROI of 0.7:1 for Phase 1 and Phase 2 based on:

- The sign up recruitment rate of a fundraiser per working day
- The average value of a donor on a monthly basis
- An estimation of pre-debit attrition rate
- 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)
- The expected age of new donors - Please provide the expected percentage of donors below 21 years/ between 21-25 years / beyond 25 years
- Number of fundraisers
- Number of team leaders
- Number of locations/venues per month