

Terms of Reference  
Face to Face Donor Acquisition services

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# 1 Introduction

## 1.1 Who we are

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the Agency has helped tens of millions of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Their staffs of more than 16,000 personnel are helping more than 68.5 million people in 138 countries. For more information, please see [www.unhcr.org](http://www.unhcr.org)

UNHCR has an ambitious Private Sector Partnership (PSP) program which endeavors to capitalize on the income from private-sector donors, through a variety of channels including Face-to-Face, Direct Mail, DRTV, Telemarketing, Online and Digital channels.

Fund Raising activities in Italy include two different main programs: the i) Individual Giving and Marketing (IG&M), raising money from individuals both regular and one-off, and the ii) Leadership Giving (LG) targeting companies, foundations, Small and Medium Sized Enterprises (SMEs), High Net Worth individuals and Legacy. PSP Italy operations include also fundraising activities in Greece and Portugal.

Inside the Individual Giving strategy, F2F program has a crucial role, representing the main channel of regular donor acquisition. PSP Italy is searching for multiple external Agencies to help the Organization raise more funds through Face to Face channel in order to boost contributions and deliver long-term sustainable solutions that provide security, dignity and future for all those caught up in tragedy of conflicts and displacements.

Recruiting new regular and high quality donors through the direct dialogue technique and increase UNHCR brand awareness are, consequently, the main objectives.

## 1.2 Statement of Purpose & Objectives

*The purpose of the present RFP is to establish a frame agreement with multiple external Face to Face Agencies, in addition to the current ones, aiming at achieving capacity necessary to reach following years objectives and at supporting UNHCR in developing and managing best practices for F2F acquisition programme and recruiting quality regular donors.*

Bidders are therefore requested to submit a proposal based on their maximum and realistic capacity to ease the decision making process.

PSP Italy intends to increase long-term and short-term financial acquisitions also from channels such as door to door, special locations and events, fairs, concerts, shopping mall, office to office, B2B, etc. For the above reasons PSP Italy may require strategic advice on new channels to be tested/exploited and in what ways, in order to reach the broadest possible number of regular donors with proper materials and communication messages.

In light of the above, PSP Italy is seeking Italian or global agencies with existing local offices in Italy and a good knowledge of Italian NGO market. Agencies covering only a geographical portion of the Italian market (ie at the regional level) are welcome and encouraged to participate.

The Agencies should be experienced in executing non-profit Face to Face campaigns or profit client on lead acquisition through the direct dialogue technique.

## 2 EXECUTIVE SUMMARY

### 2.1 General Background

The Organization is enlarging the range of Face to Face Agency program suppliers, trying, at the same time, to increase number of regular donors acquired, to raise more funds in order to boost contributions to the Organization, to expand tests, to roll out campaigns and achieving longer-term acquisition goals.

The proposal for Face to Face Agency Program is required for an initial test phase in 2019 (tentatively from April to Dec 2019), with possibility of 1 year extension until Dec 2020.

Suppliers are encouraged to submit a proposal developed according to the following structure:

- 3.1 TECHNICAL SPECIFICATIONS
- 3.2 EMERGENCY PLAN
- 3.3 INNOVATION SECTION

**Please note that in order to be evaluated in the present tendering process, Agencies are requested to submit, in their technical proposal, the documentation listed in section 3.**

### 2.2 Scenario and scope of assignment

PSP Italy is looking to appoint multiple suppliers to provide support to the Face to Face program in order to acquire new donors for the tentative period of April - December 2019 with possibility of one year extension (i.e up to December 2020).

→ **In your technical offer, please indicate the time required for the preparation and the start-up process related to the start-up date which is expected to be April 2019.**

**IMPORTANT:** PSP Italy objective is to acquire an additional number of 500 new donors per each month for the contract period.  
For this reason all those supplier/s that could contribute are kindly invited to submit their offer and are also requested to prepare their bids (technical and financial offer) based on their realistic capacity/availability.

Note that:

- Bidders are required to fill-in and submit Annex E “UNHCR Plan template 2019-2020”. By filling in the file the bidder is submitting a plan indicating its realistic maximum capacity in acquiring new regular donors exclusively for UNHCR per each year.
- Higher average donation value as well as lower % of rejects (sign-up donors that do not activate their donations) will be parameters used by UNHCR for the evaluation of the supplier.
- Front-liners cannot accept gifts or cash gifts.
- Appointed Agencies will be asked to sign off a detailed plan, based on their estimated monthly recruitment, which will be part of the agreement.
- The economic plan will be agreed at the beginning of the reference period.
- Dedicated PSP Italy staff will provide Agency’s frontliners with regular training and Team Leaders with special training and with induction training to all newly recruited face-to-face programme staff.

Please note that the Scenario described can change according to PSP Italy needs and budget availability.

PSP Italy expects that unit rates will not increase over the course of the contract period. Please consider that PSP Italy estimates 3 emergencies per year.

Bidders will be financially evaluated on the basis of the average cost per donor.

**Please do not insert any financial information in your technical proposal. Financial information and quotations are to be inserted only in your financial proposal, by filling in Annex B. Failure to submit technical and financial offers separately may result in disqualification.**

## 3 REQUIREMENTS - IMPORTANT

### 3.1 Technical Specifications

Face to Face activities refer to:

- **Recruitment of new regular donors** through the direct dialogue technique in streets, locations, fairs, etc. and manage logistical arrangements for said locations (when required).
- **Operations**
  - **data entry** (including verification call)
  - **Data exchange reports**

Please see below further details.

#### 3.1.1 Recruitment of new regular donors

- **Please provide an action plan** describing timing for start-up and roll-out of a regular donors recruitment process (logistical arrangements, training to be provided by UNHCR, production of pitch card and banners, reporting etc...);
- **Please provide Annex E “UNHCR Plan 2019-2020**, filled-in with the following information:
  - The recruiting capacity in Italy in terms of efficiency per day, pre-debit % value (no-show rate) and number of front-liners - who will be monthly involved in the UNHCR F2F campaign - in terms of Full Time Equivalent. Number of full time equivalent (6 hours a day for five days a week) front-liner can be equal or higher than number of headcount front-liner.
  - **A realistic overall maximum capacity** (Actual 2016 and 2017, forecasted 2018, and planned 2019 - 2020) of the Agency; the average monthly gift your active front-liners are currently able to ensure; the ratio between Front-liners and Team Leaders (how many Front-liners a Team Leader normally coordinates) and lastly the estimation of the attrition rates at 3, 6 and 12 months.
  - **Please indicate/describe the Team Leader / front-liner ratio and, if required, any other resource to support the UNHCR F2F campaign results** (i.e. location search, admin resources, account manager)

#### 3.1.2 Operations

##### l) Data entry system

PSP Italy is now using two different kind of new regular donors' data entry systems, as follows:

##### a) File batch system

By using this system the Agency is required to:

- Realize, within maximum 1 week from the acquisition date, a verification call in order to verify donors' data and quality of frontliners' dialogue

- Provide once a week an update/status on verification calls. Please refer to sheet named Verification Calls Batch XXX of the Annex F “Template Files”, as an example.
- Send once a week the file batch containing all donors’ data together with a file containing all VOID’s data (list of donors withdrawing during the verification call). Please refer to sheet named Batch XXX and Batch XXX - VOID of the Annex F “Information purposes”, as an example.  
 Note that sign-ups of the preceding month are to be sent within the 5th day of the subsequent month.

**b) Metaface interface**

It is a specially developed program used to record all relevant regular donors’ data. It is directly connected with UNHCR call centre and database. Verifying correctness of sign-ups inserted is very simple as well as the reporting system. In this case no file has to be sent to UNHCR neither verification calls have to be done. The only action required is the data insertion with daily frequency. The program also checks coherence and data correctness, alerting the data entry operator in case of any detectable mistake.

**Agencies should clearly indicate in their technical proposal which of the two data entry systems are able to adopt and how they can implement it.**

**In case the Agency would prefer to adopt a different system, the Agency is required to indicate and describe the system in their technical offer.**

**II) Data exchange reports**

Appointed Agencies will be required to:

1. Provide reports and statistics indicators on donor recruitment activity with a daily, weekly and monthly frequency. Please refer to sheet named weekending of the Annex F “Information purposes”, as an example.
2. Provide once a week scanned sign-ups. Each jpeg has to be named with the distinctive alphanumeric code of the sign-up including the code of the related file batch (provision of sign-ups in Jpeg format through FTP system will be considered an asset).

**Whether the Agency would prefer to use a different Data Exchange reports system please describe it in your proposal.**

- **Agencies are required to provide a description of how the data exchange report is managed.**

**Focus on payment and refunding system.**

PSP Italy currently uses a payment and refunding system based on the number of sign ups realized by the supplier through its front-liners. Each sign up has a cost for PSP Italy equal to a certain % of the annual value of the donation.

If not using UNHCR Metaface data entry system, the Agency is requested to deliver, once a week, a file reporting number of sign ups and related average donation achieved. The file is then checked by PSP Italy staff that promptly sends back to the supplier a file containing rejects/void file and related average donation. Refunds to PSP Italy are then reversed from the monthly invoice.

- Please describe refunding system, if any, in case a sign-up does not make any donation or stops to donate for reasons due to bank account, credit card technical problems or spontaneous cancellation within 5 months from the sign-up date.

Please note that actual layout of files aforementioned as examples will be agreed with the appointed Agencies.

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### **3.2 Emergency Plan**

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For the nature of its mission UNHCR faces natural and man-made emergencies for which fundraising efforts are requested. In case a humanitarian emergency occurs, involving UNHCR, an emergency alert will be sent to the supplier focal point by phone or e-mail regardless of the day of the week (communication may happen on weekends or annual leave).

- Please indicate - in the technical proposal - if you are available to discuss and agree with PSP Italy an emergency plan.

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### **3.3 Innovation**

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PSP Italy believes an innovative approach of Face to Face channels, models, pitching system and follow up is necessary to reach and overcome objectives.

- Please provide innovative suggestions for PSP Italy to improve its F2F activities, if any, and/or demonstrate the Agency's capacity for innovation and creativity in standard and Emergency situations.
- Describe any innovative projects you have done recently (for example: use of iPad with POS capability in order to reduce no-show rate almost to zero, being the first payment processed during the sign-up phase or new channels to enlarge F2F fundraising opportunities)

Please make sure you describe all the costs of different services you propose in Annex B Financial Offer Form.

## **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**

- Company profile and company registration certificate (Iscrizione al registro delle imprese);
- Year founded;
- Office presence in Italy (if multi location company, specify headquarters location);
- Balance sheet and/or Last Audit Report;
- Self-certification that contracts, including the ones for frontliners, are in line with the Italian law;
- “Documento unico di regolarità contributiva” (DURC);
- List of main clients;
- At least 3 relevant references;
- Number and description of similar and successfully completed projects and/ or currently underway;
- Any information that will facilitate our evaluation of your company’s substantive reliability, financial and managerial capacity to provide the services.

Please note that experience in the no profit sector is deemed an important technical criteria.

### **4.2 Proposed Services**

Please provide:

- Annex E “UNHCR Plan 2019-2020”
- The information highlighted in green under sections 3.1, 3.2, 3.3

### **4.3 Personnel Qualifications**

Please provide Curriculum Vitae of core staff you propose to carry out the project (max 5 CVs of max 3 pages each). CVs of front-liners are not required.

### **4.4 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). If your company is already registered with UNHCR, submit the form highlighting only your Vendor ID number.

### **4.5 Applicable General Conditions**

Your technical offer should contain your acknowledgement of the UNHCR General Conditions for Provision of Services by signing Annex D

**Important:** Please note that proposals may be prepared in English or in English and Italian. Company’s certifications are accepted in Italian.

For any additional information concerning further documentation to submit, offers evaluation, timing and modality to participate to the present tendering process please refer to the RFP cover letter.

PSP Italy strongly suggests to refer to Annex G “Check list” before submitting all documentation.

## 5 Evaluation

### 5.1 Technical Evaluation

The Technical offer will be evaluated using the following criteria and percentage distribution: 70% (i.e. 70 points) from the total score of 100 points.

CRITERIA DESCRIPTION	Weight
1. Company Qualifications	15%
General Liability / Capacity of the Company	
Overall fundraising experience/time in business within the specific service	
Presence / Experience of completing similar projects Internationally/Italy and experience in NO PROFIT/UN/UNHCR sector/environment within the specific Direct Marketing activity	
2. Quality of Service	50%
Comprehensiveness/Quality of proposal and Quality/Clarity of interpreting and presenting Proposed Services	
Quantifying Results - Quality and timing of Reporting	
Capacity of the company in terms of number of donors recruited	
Quality in terms of Key Performance Indicators (KPIs) such as pre-debit and average gift	5%
3. Project staff	
Experience of core people who will work on the project	70%
<b>TOTAL TECHNICAL SCORE</b>	

### 5.2 Financial Evaluation

Please provide your cost proposal for the project as per above requirements by filling in Annex B of this tender.

The financial component is 30% of the total score. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price.

## **6 Customer Responsibilities**

PSP Italy will be responsible for:

- Appointing a dedicated project manager;
- Providing information, documents and assistance necessary to develop the fundraising activity;
- Providing all printed materials such as pitch-cards and donor forms and merchandising materials such as T-Shirts, lanyards, folders with UNHCR logo, etc.... within agreed timelines and according to required specifications.
- Providing trainings;
- Providing support and all needed guidance in order to ensure smooth and timely communication between the supplier and offices participating in the project.
- Providing logos, materials and all needed information.

## **7 Key Performance Indicators**

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

1. ROI
2. average gift;
3. Number of Front liners in terms of Full time equivalent;
4. Rejects rate;
5. Cost per donor recruited;
6. Number of regular donors recruited;
7. Deadlines met within agreed timing.