Annex A: Terms of Reference
2019/PSP/RFP/FR/002
FOR THE PROVISION OF FACE TO FACE DONOR ACQUISITION SERVICES IN FRANCE

Bidders are required to submit any request for clarification or any question in respect of this TOR by e-mail to Ms. Erzsebet Gal at galer@unhcr.org. The deadline for receipt of questions is **the 30th of September (23:59 pm CET).**

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1 Introduction

1.1 Background

The office of the United Nations high Commissioner for Refugees was established on December 14, 1950 by the United Nations General Assembly. The agency is mandated to lead and co-ordinate international action to protect refugees and resolve problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It also has a mandate to help stateless people.

The Private Sector Partnership (PSP) Office of the United Nations High Commissioner for Refugees (UNHCR) in France 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 end of 2017 as part of a global UNHCR strategy of awareness raising and increasing private sector funding.

Since November 2017, F2F fundraising services for France have been supplied by external service providers. The organisation has grown its database steadily and currently has an active donor base of roughly 8,000 donors. Roughly 5,000 of these donors are supporting UNHCR on a monthly basis. UNHCR PSP estimates the F2F market potential for UNHCR in France between 3,000 and 5,000 new monthly giving donors per year taking into account that the French fundraising market is mature and very competitive. However, we see growth potential in F2F fundraising for UNHCR France

UNHCR expects the selected agency/ies of this RFP to be able to provide the services from January 2020 onwards.

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 several successful bidders** for each lot for an initial period of two (2) years and will be extended at the sole discretion of UNHCR for an additional one (1) year, upon satisfactory performance:

- Phase 1: January 2nd, 2020 to December 31st, 2020 (12-months period)
- Phase 2: January 2nd, 2021 to December 31st, 2021 (12-months period)
- Phase 3: January 2nd, 2022 to December 31st, 2022 (12-months period)

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

PSP France would like to identify qualified companies based on the following three set of services:

- LOT 1: DOOR TO DOOR FUNDRAISING
- LOT 2: STREET FUNDRAISING

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- LOT 3: PRIVATE SITE FUNDRAISING

Companies can submit a proposal to LOT 1; LOT 2; and LOT 3 separately. It is not a mandatory to send an offer for all services. The evaluation of the different lots will be carried out separately on technical and financial level. Please make sure the all requirements per lots are included into your proposal. Please also indicate clearly the services/lots you are bidding for to ease the evaluation process.

UNHCR expects to achieve the following targets:

- Donor number Lot 1 1 door-to-door fundraising, minimum 50 new monthly giving donors per month (in total 600 new giving donors for 12-month)
- Donor number Lo1 2 street fundraising, minimum 50 new monthly giving donors per month (in total 600 new giving donors for 12-month)
- Donor number Lo1 3 private site fundraising, minimum 60 new monthly giving donors per month (in total 600 new giving donors for 12-month)
- Attrition of maximum 30% (cumulative) over a 12-month period after acquisition
- Average monthly donation is 15 Euro (future upward adjustment is possible).
- Recruiting donors above 30 years of age
- Cumulative Return on Investment (ROI):
    - Month 12: 0.8
    - Month 24: 1.8
    - Month 36: 2.7

- Frontliners cannot accept gifts on Face to Face campaigns. Cash gifts, bank checks, one-off donations cannot be received by the frontliners.

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

- number of frontliners.
- number of teams.
- number of locations/venues per month.
- number of cities where the programme will be run.

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.

In order to be eligible to participate at this bidding, your company must be authorized to work / do business in France and perform the required services, as described below. In order to establish compliance with these criteria the registration certificate/certificate of incorporation is to be sent. Failure to comply with these pre-selection requirements, will result in disqualification.

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2 Requirements

The evaluation of the F2F donor acquisition services will be carried out separately on technical and financial levels.

- LOT 1: DOOR TO DOOR FUNDRAISING
- LOT 2: STREET FUNDRAISING
- LOT 3: PRIVATE SITE FUNDRAISING

Bidders are requested to prepare their technical proposal based on the requirements listed below and quote for the services **separately** on Annex B – financial offer form.
No pricing information can be included into the technical proposal. Failure to comply with these criteria will result in disqualification.

2.1 General requirements for lot 1, lot 2 and lot 3

2.1.1 Global account management

Please describe the global management of your activity, and your internal processes, in terms of:

- **Recruitment**: the process your company recruits frontliners, the type and length of contract offered. Contractor(s) will be required to deploy at the request of UNHCR team(s) suitable competent persons with relevant expertise to perform the F2F donor acquisition services.
- **Training and motivation**: your internal process to train the fundraisers and be sure that the speech delivered to prospects is accurate, efficient and compliant with the organization rules. Your motivation strategy to make and keep fundraisers motivated.
- **Staff conduct**: please describe how you will
    - 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
    - Ensure that all staff members comply with applicable laws and regulations whilst carrying out activities in relation to UNHCR's F2F programme.
- **Welcome/verification emails and/or calls**: please describe the strategy for the different communications after the subscription, the design (zoning), the script (basis)…
- **KPIs and performance evaluation**: your process for analyzing individual performance of the recruitment teams and recruiters and your quality control.
- **Technical aspects**: the way donors are acquired (paper forms, tablets etc.), proposed solution for data transfer to UNHCR database (UNHCR France uses iRaiser and Odoo platform to manage IBAN regular donors), frequency of transfer and compliance with data protection.
- **Reporting**: please provide an example of a weekly acquisition report. Please provide any reporting tool/samples that you send to your clients (welcome email reporting and welcome call reporting).
- **Working relationship**: please propose the most efficient way to communicate with

UNHCR, including the frequency of meetings required. Please explain how you build a strong and efficient partnership with your clients, based on your realistic capacity I.e. sending a report by email each week, having a call once a month, physical meeting every 2 or 3 months, planning specific training sessions, mid-year review.

2.1.2 Strategy and logistics arrangement supporting F2F operation

The Contractor(s) is expected to provide the following services:

- Strategic recommendations for F2F donor acquisition operations
- Plan for and arrange locations for all F2F teams.
- Prepare and submit F2F operation proposals to UNHCR for consideration and approval.
- Prepare and submit applications to obtain approval and all relevant permits from all concerned parties.
- Coordinate and manage the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners, fundraising booths and uniforms to support the F2F programme at the predefined locations; items such as banners and booths shall be self-produced by vendors upon UNHCR's approval.
- Provide identification badges for the F2F programme staff.
- 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.

2.1.3 Control and submission of donation forms

- Collect donations in the form of a pledge by a donor to have an amount deducted from the donor's bank account and paid into a UNHCR bank account on a monthly basis as a donation to UNHCR by the donor.
- 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.
- The agency should:
    - 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 1 (one) week.

Currently, our agency uploads once a week the file of confirmed new donors into our Odoo/iRaiser database.

- Prepare and submit weekly and monthly location plans for all F2F teams.
- Inform in writing UNHCR of any change of location as early as possible.
- Provide verbal and writing reports of any misconduct or complaint received regarding staff engaged in UNHCR's F2F activities as soon as practicable and with actions taken and/or proposed to remedy within three (3) working days.

2.2 LOT 1: door to door fundraising

Please explain your strategy to recruit qualitative regular donors through door to door:

- Your vision and global strategic approach (your choices, your decisions to maximize the qualitative donor profile.)
- An estimative production plan (by cities, by month)
- The recruitment team organigram and profiles
- The donor communications (pitch cards, emails, SMS, calls) to ensure qualitative

recruitment before being recorded into the database
- The innovations and/or any creative ideas that will make the difference with your competitors and help us to reach our objectives

2.3 LOT 2: street fundraising

Please explain your strategy to recruit qualitative regular donors in the street:
- Your vision and global strategic approach (your choices, your decisions to maximize the qualitative donor profile)
- The different types of areas and/or cities
- An estimative production plan (by cities, by month)
- The recruitment team composition
- The donor communications (pitch cards, emails, SMS, calls scripts) to ensure qualitative recruitment before being recorded into the database
- The innovations and/or creative ideas that will make the difference with your competitors and help us to reach our qualitative objectives
- BONUS: if UNHCR has an opportunity (through a corporate partnership for example) to generate and collect leads in the street, can you please describe your capacity/strategy/experience in the technical offer, and your pricing conditions in the Annex B (sheet 3. Cost breakdown)

2.4 LOT 3: private site fundraising

Please explain your strategy to recruit qualitative regular donors in Private Sites:
- Your vision and global strategic approach (your choices, your decisions to maximize the qualitative donor profile)
- The different types of private sites you can access: malls, specific partnerships with brands or corporates, events, fairs, etc.
- The number of private events to manage in order to achieve the operation goals
- An estimative production plan (by site, by cities, by month)
- The recruitment team organigram and profiles
- The donor communications (pitch cards, emails, SMS, calls scripts) to ensure qualitative recruitment before being recorded into the database
- The innovations and/or any creative ideas that will make the difference with your competitors and help us to reach our objectives.
- Private sites fundraising: contractor(s) will be required to mobilize sufficient numbers of operation support staff to provide the services and meet the requirements. The venue and dates will be agreed ahead with UNHCR.
- BONUS: if UNHCR has an opportunity (through a corporate partnership for example) to generate and collect leads in the street, can you please describe your capacity/strategy/experience in the technical offer, and your pricing conditions in the Annex B (sheet 3. Cost breakdown)

Bidders are required to submit any request for clarification or any question in respect of this TOR by e-mail to Ms. Erzsebet Gal at galer@unhcr.org. The deadline for receipt of questions is **the 30th of September (23:59 pm CET).**

3 Customer Responsibilities

UNHCR is responsible for providing the following:

- Content for fundraising materials.
- Liaising with the Contractor, attending regular project management calls and meetings
- Reconciling reports submitted by the Contractor with UNHCR database reports
- Providing the income processing platform
- Providing necessary training for the fundraisers and frequent visits to the different recruitment locations

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

In order to be eligible to participate at this bidding, your company must be authorized to work / do business in France and perform the required services, as described below. In order to establish compliance with this criteria, registration certificate/certificate of incorporation is to be sent.

Failure to comply with these pre-selection requirements, will result in disqualification.

Please clearly indicate on your technical proposal the lot (group of services) you are bidding for. In case you bid for more than one lot, you can submit a combined proposal. Please make sure that relevant requirements (listed under point 2) are clearly addressed.

- LOT 1: DOOR TO DOOR FUNDRAISING
- LOT 2: STREET FUNDRAISING
- LOT 3: PRIVATE SITE FUNDRAISING

4.2 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) financial soundness and stability* and your *(2) F2F service provision experience in the non-profit sector*:

1. Please provide:
    - Last balance sheet, last year audit reports 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[1]
2. 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;
3. F2F fundraising experience in the French non-profit landscape, the number of similar and successfully completed or currently underway projects to donor acquisition process; please also list your clients in this sector.
4. Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

4.3 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 under point 2*

[1] UNHCR handles all bidding documents strictly confidential during the tendering process. Please refer to UNHCR General Conditions of Contracts, clause 13.

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(as relevant) and the capacity to achieve the proposed targets and (3) any innovative idea, strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate:

- The comprehensiveness of the proposal, whether the proposal follows the structure of this ToR. General company profile will not be accepted.
- A detailed proposal to prove your agency`s compliance with the general requirements listed under 2.1
- A clear description on your company`s capacity (you are requested to prepare the proposal based on the maximum and realistic capacity/availability of your company even if it is lower or higher than the set figures listed under point 1.2) and the strategy on how to achieve these targets
- A detailed proposal to prove your agency`s compliance with requirements listed under point 2.2, 2.3 and 2.4 (as relevant to Lot 1, Lot 2 and Lot 3)
- Any innovative idea or strategy to acquire quality, long-term committed donors and reduce the attrition rate.

4.4 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 for 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;
- Describe their experience and expertise in working in the charity sector to ease scoring.

4.5 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).

4.6 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

4.7 Applicable Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E).

4.8 Clawback or any monetary refund proposed

Please confirm in your technical proposal if your company offers any clawback or monetary refund. Currently, PSP France settles payment based on the donor number after welcome & verification call, only for donors successfully entered into Salesforce database for the first debit and to start the retention program. In case you propose clawback, please detail the

mechanism for donors who lapse before the first payment, or before the second payment, the third.

4.9 Language requirements

You can send your proposal either in English or in French.

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5 Evaluation

5.1 Technical evaluation for lot 1 (door to door)

Pre-selection criteria: in order to be eligible to participate at this bidding, your company must be authorized to work / do business in France and perform the required services, as described below. In order to establish compliance with this criteria, registration certificate/certificate of incorporation is to be sent.

Failure to comply with these pre-selection requirements, will result in disqualification.

Companies being compliant with the pre-selection criteria will be further evaluated as per below.

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.

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.
Fundraising experience in the French non-profit landscape (10 points)	The scores will be allocated for the number projects (previous and current in total) 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 in case of selection.
Proposed Services (max 45 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 2.1 (15 points)	A detailed section on the technical proposal to prove your agency`s compliance with the general requirements listed under 2.1
The capacity and strategy to achieve the proposed results, including services listed under section 2.2 (20 points)	Comprehensive proposal to be presented including services listed under point 2.2 for door to door fundraising. Clear description on the maximum, realistic capacity/availability and detailed strategy proposed to achieve targets.

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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
Personnel Qualifications (max 10 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 35 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 Technical evaluation for lot 2 (street)

Pre-selection criteria: in order to be eligible to participate at this bidding, your company must be authorized to work / do business in France and perform the required services, as described below. In order to establish compliance with this criteria, company profile and registration certificate are to be sent.

Failure to comply with these pre-selection requirements, will result in disqualification.

Companies being compliant with the pre-selection criteria will be further evaluated as per below.

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.

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.
Fundraising experience in the French non-profit landscape (10 points)	The scores will be allocated for the number projects (previous and current in total) 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 in case of selection.
Proposed Services (max 45 points)	**Documents, information to be provided to establish compliance with the set criteria**

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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 2.1 (15 points)	A detailed section on the technical proposal to prove your agency`s compliance with the general requirements listed under 2.1
The capacity and strategy to achieve the proposed results, including services listed under section 2.3 (20 points)	Comprehensive proposal to be presented including services listed under point 2.2 for street fundraising. 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
Personnel Qualifications **(max 10 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 35 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.

5.3 Technical evaluation for lot 3 (private site)

Pre-selection criteria: in order to be eligible to participate at this bidding, your company must be authorized to work / do business in France and perform the required services, as described below. In order to establish compliance with this criteria, company profile and registration certificate are to be sent.

Failure to comply with these pre-selection requirements, will result in disqualification.

Companies being compliant with the pre-selection criteria will be further evaluated as per below.

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.

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.

Bidders are required to submit any request for clarification or any question in respect of this TOR by e-mail to Ms. Erzsebet Gal at galer@unhcr.org. The deadline for receipt of questions is **the 30th of September (23:59 pm CET).**

Fundraising experience in the French non-profit landscape (10 points)	The scores will be allocated for the number projects (previous and current in total) 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 in case of selection.
Proposed Services **(max 45 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 2.1 (15 points)	A detailed section on the technical proposal to prove your agency`s compliance with the general requirements listed under 2.1
The capacity and strategy to achieve the proposed results, including services listed under section 2.4 (20 points)	Comprehensive proposal to be presented including services listed under point 2.2 for private site fundraising. 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
Personnel Qualifications **(max 10 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 35 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.

5.4 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 acquisition CPA) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

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

- Cost per donor for acquisition
- 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 financial ranking will be based on the CPA (cost per acquisition, i.e. donor recruitment cost) for newly hired donors. Please indicate your maximum and realistic capacity in terms of donor number and different attrition rates. The total cost for different phases is confirmed to ease the CPA calculation.

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6 Key Performance Indicators

6.1 Performance Evaluation

It is of great importance to UNHCR to acquire high quality donors, meaning donors with a high lifetime value (LTV). The LTV, which is the result of the level of investment, the income and the length of the relationship with the donor, is the most important KPI. Therefore, our retention rates are a critical KPI for reaching our long-term goals. To promote the highest retention rates, the volumes (= total number of donors) to be recruited by each supplier will be based on the performance in that area in the previous period.

UNHCR expects to monitor the performance of the selected supplier on a monthly basis mainly, but not exclusively, according to the following KPIs:

- Cost per donor
- Donors per month
- Monthly donation
- Monthly attrition rates
- ROI & LTV