



Annex A: Terms of Reference
GHANA/RFP/PSP/2019/001
FOR THE PROVISION OF FACE-TO-FACE DONOR ACQUISITION AND DONOR
RETENTION SERVICES IN GHANA

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 29th of October.

Table of Contents

1	Introduction	3
1.1	Background	3
1.2	PSP Africa	3
1.3	Statement of Purpose & Objectives.....	4
1.3.1	Objectives – donor acquisition	4
1.3.2	The UNHCR expects to achieve the following return on its investments:	4
1.3.3	The UNHCR expects to achieve the following number of new donors:.....	4
1.3.4	Donation	5
1.3.5	Attrition rate:	5
1.3.6	UNHCR PSP expectation for donor retention services	5
2	Requirements	6
2.1	F2F donor acquisition services.....	6
2.1.1	F2F event.....	6
2.1.2	Collect donation.....	6
2.1.3	Deployment	6
2.1.4	Staff administration.....	7
2.1.5	Equipment:.....	7
2.1.6	Damage, Loss or unreturned Equipment:	8
2.1.7	Reporting	8
2.2	Donor Retention Services	9
2.2.1	Data entry and daily processing	9
2.2.2	Process the debiting of the donor credit/debit cards and bank accounts	9
2.2.3	Welcome packages	9
2.2.4	Maintenance calls	9
2.2.5	Design, printing, and delivery of donor care materials	9
2.2.6	Call service	9
3	Customer Responsibilities	10
4	Content of the Technical Offer	11
4.1	Company Qualifications	11
4.2	Proposed Services.....	11
4.2.1	For donor acquisition services:.....	12
	• A description of your agency`s capacity to scale up a F2F donor acquisition operation and to provide the service in the ToR 2.1	12
4.2.2	For donor retention services.....	12
	• A description of your agency`s capacity to scale up a F2F donor retention operation and to provide the service in the ToR 2.2	12
4.3	Personnel Qualifications	12
4.4	Vendor Registration Form.....	12
4.5	Applicable General Conditions.....	12
4.6	Applicable Special Data Protection Conditions	12
5	Evaluation.....	13
5.1	Technical evaluation acquisition services.....	13
5.2	Technical evaluation retention services	14
5.3	Financial evaluation	14
5.3.1	Annex B1: Financial Offer Form for F2F Acquisition Services	15
5.3.2	Annex B2: Financial Offer Form for F2F Retention Services	15
6	Key Performance Indicators	16
6.1	Performance Evaluation.....	16

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 29th of October.

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) raises awareness on refugee issues and asks individuals to financially support UNHCR's activities through interactions with members of the public. UNHCR private sector income continues to grow at a high rate and we have now private sector fundraising programs in over 30 countries. The two main sources of generating funds are the (1) individual giving and (2) partnerships. Individual giving programs are systematically raising funds from individual donors, through cash donations or preferable as monthly committed giving donors, while partnership involves acquisition and cultivation of high-value partners from corporations, foundations, and philanthropists.

Face to face

Face-to-face donor acquisition is the common term for direct conversations with the general public to ask for support. This can be in locations such as on the street, in shopping malls, at events or going door to door to people's homes. Beyond raising funds, the millions of conversations that these fundraisers have with the public also help to explain our work and raise awareness on the refugee cause. Having donors on board via F2F will open the journey called donor development/retention. After having an initial gift, PSP focuses on retention is combatting attrition by creating an effective welcome journey via programs to keep donors on board; convert them into regular donors; increase the monthly donation. The process from acquisition through donor development leads to better return on investment (ROI, fundraising best value for money indicator) and to increase the lifetime value of donor supporting UNHCR. Face-to-face plays a vital role in successful donor acquisition. More than 70% of the supporters that support UNHCR have come via Face to Face fundraising activity

1.2 PSP Africa

Private Sector Partnership (PSP) Africa has made great strides in digital and mobile fundraising, especially with the launch of the LuQuLuQu Campaign. This has helped with advocacy in changing the narrative and perception of the African refugees and thereby building a platform for public engagement while giving leads, and acquisition of One-Off (OO) donors.

Face to Face (F2F) fundraising is a major donor acquisition source for non-profits in South Africa like Save the Children, UNICEF, WWF, and has proved to be successful in acquiring

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 **29th of October**.

committed donors. Accra (Ghana) has shown potential, proven with the launch of the LuQuLuQu campaign in 2018. In its first year of operations, the Private Sector Partnerships unit in Ghana has instituted a sustainable donor engagement program for the refugee cause mostly via digital channel.

In order to expand fundraising and to reach out to potential supporters, UNHCR Ghana seeks to launch its F2F operations in collaboration with service providers to expand its reach and support from the Ghanaian donor market.

1.3 Statement of Purpose & Objectives

In order to achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR is seeking to enter into a Long-Term Agreement (LTA) for F2F donor acquisition and retention services with vendors specializing in such service area.

The Frame Agreement will be signed with more than one successful bidder for an initial period of twelve (12) months and will be extended at the sole discretion of the UNHCR for additional twelve (24) months (Phase 2 & 3), 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)

Budget allocation cannot be revealed by UNHCR at this point in time but will be disclosed to the chosen supplier after the RFP.

1.3.1 Objectives – donor acquisition

1.3.2 The UNHCR expects to achieve the following return on its investments:

Phase 1 ROI: 0.9

Phase 2 1st year ROI: 1.5

Phase 2 2nd year ROI: 2.3

Our expectation is to view proposals that are designed to reach a minimum return on investment of 1. Within 12 months based on:

- number of new donors
- average monthly donation
- attrition
- donor cost

1.3.3 The UNHCR expects to achieve the following number of new donors:

- Phase 1: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2020 until the 31st of December 2020.
- Phase 2: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2021 until the 31st of December 2021.

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 **29th of October**.

- Phase 2: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2022 until the 31st of December 2022.

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 program will be run

1.3.4 Donation

- The average donation per donor per month is 70 GH
- Monthly donations/pledges will be set up by direct debit or credit card
- Canvassers cannot accept gifts on the street.
- No cash gifts can be received by the canvassers.

1.3.5 Attrition rate:

PSP Africa - Ghana focuses on reducing the donor attrition rate in order to increase the lifetime value of donors and the predictable income to UNHCR. UNHCR projection is the following:

- Pre-debit attrition can be less than or equal to 20%
- Cumulative 12-month attrition no higher than 25%

(Example: 3-months 4% - 6 months 10% - 12 months 11% in total %25 attrition rate).

1.3.6 UNHCR PSP expectation for donor retention services

- **The minimum objective** for the rollout period is to keep 12 months retention rate above 90% and a 60% retention rate for overall UNHCR donor database.
- **Minimum objective** 30% of the agreed rate of an upgrade for the 12-month active donors.
- **Minimum objective** delivers first 12 months communication for recruit donors through face to face
- Any adjustment on the number of target donors to be acquired shall be mutually agreed by both UNHCR and the Retention service provider prior to the execution of the contract and subject to revision every six (6) months.

Please note that these figures (ROI, min. donors and min. donation) 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 it is lower or higher than UNHCR objectives.**

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 29th of October.

2 Requirements

The contractors will need to deliver the F2F Fundraising Recruitment Services as per the following:

F2F Donor Acquisition Services

And / Or

F2F Donor Retention Services

Bidders can submit a proposal for recruitment or for retention services, or for both services. **Please kindly note that it is not mandatory to submit a proposal for both.**

The evaluation of the above services will be carried out separately both on technical and financial levels.

Vendors are requested to prepare their technical proposal based on the requirements listed under point 2 and quote for the services separately for recruitment and for retention on Annex B 1 & 2 – Financial offer forms.

2.1 F2F donor acquisition services

2.1.1 F2F event

Conduct the F2F fundraising campaigns at shopping malls, events, businesses, and targeted public and private sites to solicit regular giving (i.e. monthly) donations.

2.1.2 Collect donation

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.

2.1.3 Deployment

Contractor(s) will be required to deploy at the request of the UNHCR team(s) of suitable competent persons with relevant expertise, (hereinafter referred to as "Fundraisers", "dedicated staff and "Team Leader") to perform the face-to-face donor acquisition services. Fundraisers representing UNHCR on average are 15 people per month.

- One (1) Dedicated staff 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
- One (1) Team Leader 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.

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 29th of October.

- The Contractor(s) will be required to identify a dedicated staff (s) to:
 - Serve as a focal point to oversee the effective implementation of the F2F program.
- The contractor (s) will be required to mobilize enough numbers of operation support staff to provide the services.
- Any adjustment on the number of target donors to be acquired, it shall be mutually agreed by UNHCR and the Contractor prior to the execution of the contract and subject to revision every six (6) months

2.1.4 Staff administration

- Recruitment of Staff: Plans and coordinates the recruitment of highly competent staff to effectively perform the activities as required under the UNHCR F2F program
- Staff Administration: Monitors the attendance, performance, and conduct of staff who are involved in the UNHCR F2F programme
- Logistics Arrangement that Supports the F2F Operation: Plans and applies for locations for all F2F teams; Prepares and submits F2F operation proposal to UNHCR for consideration and approval; Prepares and submits application to obtain approval and all relevant permits from all concerned parties; Manages the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners and uniforms to support the F2F program at the predefined locations
- Control of handheld device(s): Each iPad should carry a unique serial number and should be strictly controlled by the Contractor; All iPad must always be accounted for; Ensures all E- Mandate columns are accurately completed and signed by the donors.

2.1.5 Equipment:

- Ownership: UNHCR retains the sole right of possession of the iPad and grants permission to the employee/s of the contractor to use the iPad according to the guidelines set forth in this document. UNHCR retains the right to collect and/or inspect the iPad and accessories at any time, including via electronic remote access; and to alter, add, erase or delete installed software (including the device iOS) or hardware.
- Equipment Provided: Efforts are made to keep all iPad configurations the same. All systems include ample memory, applications, and wireless network capability. UNHCR will retain records of the serial numbers of provided equipment.
- Substitution of Equipment: In the event the iPad is inoperable, UNHCR has a limited number of spares for use while the iPad is repaired or replaced. This agreement remains in effect for such a substitute.
- Responsibility for Installed Software: The contractor may not install any software which violates the conditions set out in this document. Uninstalling any UNHCR provided or iOS software or profiles from the iPad is not permitted.

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 29th of October.

2.1.6 Damage, Loss or unreturned Equipment:

- Warranty for Equipment Malfunction: UNHCR has a limited manufacturer's warranty for the iPad. The warranty only covers damage to the iPad caused by manufacturer's defects.
- Responsibility for Damage: The Contractor is responsible for maintaining a 100% working iPad and accessories at all times. The Contractor shall use reasonable care to ensure that the iPad and accessories are not damaged. Refer to the Standards for Proper Care below for a description of expected care
- Return of equipment: At the end of the Contractor's contract with UNHCR, you are required to return the iPad and all accessories to the administrative office. UNHCR will charge the Contractor for any items not returned.
- Technical Support and Repair: UNHCR will provide technical support, maintenance, and repair. Any attempt to repair outside of UNHCR may result in the contractor being charged the full replacement cost of the device or accessories.
- Training: provision of induction training to all newly recruited F2F programme staff; Provision of regular training for all fundraisers; Provision of special training for team leaders
- Motivation: Plans, develops and maintains motivation schemes as deemed appropriate; Prepares and submits proposal for motivation schemes to UNHCR for consideration; Approval
- Performance Assessment: Conducts daily performance assessments of fundraisers by Team Leader; Conducts daily and weekly performance assessments of Team Leader by the dedicated (s); Conducts regular on-site supervision by a dedicated staff (s)
- Monitoring Staff Conduct: Ensures that no F2F programme staff engages in any misleading or deceptive conduct; Ensures that apart from completing the donation forms on the iPads, 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 while carrying out activities in relation to UNHCR's F2F programme.

2.1.7 Reporting

- Prepares and submits monthly location plans for all F2F teams; Informs UNHCR of any change of location within the same day;
- Provision of verbal report of any misconduct or complaint received regarding staff engaged in UNHCR's F2F activities as soon as practicable and of written reports with actions taken and/or proposed a remedy to UNHCR within two (2) working days;
- Providing weekly and monthly reports of donor acquisition results and claw back reports (or of any form of monetary discount based on donor attrition (refer to Annex

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 **29th of October**.

B Financial Offer Form); Holding of weekly project management calls, meetings and monthly face-to-face meetings with UNHCR staff.

2.2 Donor Retention Services

2.2.1 Data entry and daily processing

Including registering forms and transferring the data electronically to UNHCR's data house directly (as per file layout specs) for uploading into its database, gift processing; plus providing reporting practices and measurable metrics.

2.2.2 Process the debiting of the donor credit/debit cards and bank accounts

Every month with second and third attempts if needed. Provide monthly detailed reporting in order to do reconciliations and fundraising analysis (Donation report, financial report, attrition report).

2.2.3 Welcome packages

Developing (with UNHCR) a welcome package (letter and donor flyer guide), laser printing, packaging and delivery (by the recruiters).

2.2.4 Maintenance calls

Welcome SMS plus periodic calls to verify donors' commitment and details.

2.2.5 Design, printing, and delivery of donor care materials

To donors in Year 1 including a mailed Welcome Pack, quarterly newsletters (12 A4 pages in full color), up to eight electronic mails and other communications as may be required.

2.2.6 Call service

Serve upgrade and reactivation calls as well as address inbound calls from donors.

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 29th of October.

3 Customer Responsibilities

The UNHCR is responsible for providing the following:

- Designing, printing and delivering acquisition material (e.g. pitch cards, leaflets, donation forms/ platforms, banners, uniforms, welcome packages)
- Liaising with the Contractor attends regular project management calls and meetings
- Reconciling reports submitted by the Contractor with UNHCR database reports
- Providing the income processing platform
- Provide training and coaching support

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 **29th of October**.

4 Content of the Technical Offer

No pricing information can be included into the technical proposal. Failure to comply with this requirement will result in disqualification.

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

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) *service provision experience* in:

1. Please provide¹:

- 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.
- Registration certificate/certificate of incorporation to prove that your company is authorized to do business in Ghana.
- 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;
- Direct marketing experience;
- Total number of clients, please provide a list;
- You are requested to provide three (3) references that we will contact from your current client list in case of selection.

4.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *the comprehensiveness of the proposal* and (2) *your company`s compliance regarding the required services listed under point 2; the capacity scales up and to achieve the proposed targets* and (3) *the number of projects successfully completed and/or currently on-going*:

- The comprehensiveness of the proposal, whether the proposal follows the structure of this ToR. The general company profile will not be accepted.
- Please indicate the number of direct marketing projects (in private or in non-profit sector) successfully completed and/or currently under-way.

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

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 29th of October.

4.2.1 For donor acquisition services:

- A description of your agency`s capacity to scale up a F2F donor acquisition operation and to provide the service in the ToR 2.1
- A description of your agency`s strategy on how to achieve the proposed targets listed under point 1.3.1, focusing on long-term commitment and reduced attrition for donor acquisition services.

4.2.2 For donor retention services

- A description of your agency`s capacity to scale up a F2F donor retention operation and to provide the service in the ToR 2.2
- A description of your agency`s strategy on how to achieve the proposed targets listed under point 1.3.6, focusing on reduced attrition for donor retention services.

4.3 Personnel Qualifications

Please indicate the composition of the team (project managers, paid F2F staff, subcontractors, consultants) you propose to provide for the project. In particular:

- Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TOR;

4.4 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).

4.5 Applicable General Conditions

Please indicate your acknowledgment of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) and include the signed copy into your submitted Technical Proposal.

4.6 Applicable Special Data Protection Conditions

Please indicate your acknowledgment of the UNHCR Special Data Protection Conditions (Annex E) and include the signed copy into your submitted Technical Proposal.

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 **29th of October**.

5 Evaluation

5.1 Technical evaluation acquisition services

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: **70% (on a 100 points scale, i.e. 70 points max)** from the total score.

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (10 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. Registration certificate/certificate of incorporation to prove that your company is authorized to do business in Ghana.
Direct marketing experience (10 points)	The scores will be allocated for the number clients (previous and current in total) in the private sector, based on the evidence provided.
Proposed Services (max 40 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.
Number of direct marketing project (in private and/or in non-profit sector) (5 points)	The scores will be allocated for the number of direct marketing projects (successfully completed and/or currently under-way in total) in private and/or in non-profit sector, based on the evidence provided.
The capacity to scale up a F2F donor acquisition operation (15 points)	A detailed section in the technical proposal to prove your agency's capacity/capability to scale up a F2F donor acquisition operation and fulfilment with services listed under 2.1.
The strategy to achieve the proposed targets (15 points)	A detailed section in the technical proposal to describe your agency's strategy to achieve the proposed targets listed under 1.3.1 for the F2F donor acquisition operation.
Personnel Qualifications (max 10 points)	Documents, information to be provided to establish compliance with the set criteria
	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 are 35 points out of 70 points; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

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 **29th of October**.

5.2 Technical evaluation retention services

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: **70% (on a 100 points scale, i.e. 70 points max)** from the total score.

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (10 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. Registration certificate/certificate of incorporation to prove that your company is authorized to do business in Ghana.
Direct marketing experience (10 points)	The scores will be allocated for the number clients (previous and current in total) in the private sector, based on the evidence provided.
Proposed Services (max 40 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.
Number of direct marketing project (in private and/or in non-profit sector) (5 points)	The scores will be allocated for the number of direct marketing projects (successfully completed and/or currently under-way in total) in private and/or in non-profit sector, based on the evidence provided.
The capacity to scale up a F2F donor retention operation (15 points)	A detailed section in the technical proposal to prove your agency's capacity/capability to scale up a F2F donor retention operation and fulfilment with services listed under 2.2.
The strategy to achieve the proposed targets (15 points)	A detailed section in the technical proposal to describe your agency's strategy to achieve the proposed targets listed under 1.3.6 for the F2F donor retention operation.
Personnel Qualifications (max 10 points)	Documents, information to be provided to establish compliance with the set criteria
	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 are 35 points out of 70 points; 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 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 1 & 2.

Please note that your financial proposal cannot be amended or changed after the submission of the bid. The financial offer will be the part of the frame agreement with the winner agencies, thus it will be considered as your agency's price list for the duration of the

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 **29th of October**.

contract. For this reason, we kindly ask you to make sure that appropriate fees are confirmed.

5.3.1 Annex B1: Financial Offer Form for F2F Acquisition Services

The maximum number of points (30) will be allotted to the lowest price offer (cost per acquisition CPA) 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 offered by the Contractor(s). Cost per donor for acquisition, average monthly donation expected, 12-month ROI, attrition at 3, 6 and 12 months, as well as the number of fundraisers, teams, locations, and cities suggested, will help to assess the pertinence of the proposal.

Annex B – sheet 1, the financial ranking will be based on the CPA (cost per acquisition) for new donors. The calculation of donor numbers includes the pre-debit then 3rd, 6th, and 12th-month attrition than to estimate the CPA we use the cost of recruitment, divided by the number of donors.

Annex B – sheet 2, please provide a breakdown for the cost indicated.

Annex B – sheet 3, please provide the cumulative income and 12-month ROI projection.

Annex B – sheet 4, please provide your cost calculation, including the proposed clawback.

Please make sure to fill in the sheet “clawback”. Please be noted that clawback system is highly preferred to be offered by Contractor(s) in order to ensure the provision of high quality and efficient services. Please also be noted that UNHCR only pays for donors who have successfully transferred their first payments, and this payment system shall remain unchanged in the future.

5.3.2 Annex B2: Financial Offer Form for F2F Retention Services

The maximum number of points (30) will be allotted to the lowest price proposal and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

The number of new donors for each phase to be retained:

- Phase 1: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2020 until the 31st of December 2020.
- Phase 2: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2021 until the 31st of December 2021.
- Phase 2: 416 new donors per month on average, meaning approximately 4992 donors for the period of 2nd of January 2022 until the 31st of December 2022.

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 29th of October.

6 Key Performance Indicators

6.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier on a monthly basis according to the following KPIs:

- Average monthly donation
- Average donors per month
- Attrition rates
- ROI
- Cost per donor