



Annex A: Terms of Reference
RFP/25/013/NETHERLANDS/PSP
REQUEST FOR PROPOSAL
FOR THE PROVISION OF FACE-TO-FACE DONOR ACQUISITION SERVICES FOR UNHCR PRIVATE
SECTOR PARTNERSHIPS IN THE NETHERLANDS

Table of Contents

1	Introduction	3
1.1	Background	3
1.2	Statement of Purpose & Objectives.....	3
1.2.1	UNHCR objectives	3
1.3	Pre-selection criteria	4
1.4	Joint venture, subcontracting	5
2	Requirements	6
2.1	F2F fundraising donor acquisition services	6
2.2	Staff administration.....	6
2.3	Logistics arrangement supporting F2F operation.....	7
2.4	Reporting	7
3	Customer Responsibilities	9
4	Content of the Technical Offer	10
4.1	Company Qualifications	10
4.2	Proposed Services	10
4.3	Account management	10
5	Evaluation.....	11
5.1	Technical evaluation	11
5.2	Financial evaluation	12
6	Key Performance Indicators	14
6.1	Performance Evaluation	14

1 Introduction

1.1 Background

The office of the United Nations High Commissioner for Refugees (UNHCR) was established on December 14, 1950, by the United Nations General Assembly. The agency is mandated to lead and coordinate international action to protect refugees and stateless people and resolve problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees.

The Private Sector Partnership (PSP) Office of UNHCR in the Netherlands 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 2016 as part of a global UNHCR strategy of awareness raising and increasing private sector funding.

Since the end of 2016, F2F fundraising services for NL have been supplied by external service providers. The organisation has grown its database steadily and currently has an active donor base of roughly 100.000 donors. Roughly 60.000 of these donors are supporting UNHCR with a recurring pledge. UNHCR PSP estimates the F2F market potential for UNHCR in NL between 15,000 and 100.000 new monthly giving donors per year.

UNHCR expects the winner(s) of this RFP to be able to provide the service from January 2026 onwards

1.2 Statement of Purpose & Objectives

To expand its F2F program whilst ensuring outstanding quality of service, UNHCR is seeking to enter into a Frame Agreement (FA) for the initial period of twelve (12) months with specialized service providers, with possibility of extension for two times twelve (12) months period, subject to satisfactory performance.

The tentative start of the new contracts is November 2025.

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

1.2.1 UNHCR objectives

UNHCR objective is to contract several vendors. The overall target for to be acquired donors will be spread out over several agencies.

UNHCR is looking for different types of vendors to spread out donor acquisition and ensure quality. UNHCR is looking to work with partners who can recruit bigger numbers (more than 4.000 donors per year) and partners who are able to recruit smaller numbers (1.500-4.000 donors per year).

The mandatory minimum capacity is set at 1500 new donors per year. We ask all vendors to share your CPA for the minimum capacity for the to be acquired number. This number is not a minimum guaranteed number – it represents a minimum capacity. If a vendor can acquire more, they are free to offer a volume discount.

- The importance of securing as many competent service providers as possible for F2F programs as a disruption mitigation strategy has been highlighted by force majeure situations such as COVID-19.
- The proposed set-up whereby multiple suppliers are selected to deliver the same service is the best practice that is applied by other charities and non-profit organizations who work on face-to-face fundraising. Establishing working relations with all relevant players in the market is therefore crucial.
- By appointing multiple vendors, risk of loss and underperformance is divided between them.
- **PSP Netherlands operational plan is to work with up to seven vendors simultaneously.**
- Awarding multiple vendors for a simultaneous working agreement supports UNHCR PSP Netherlands strategy in which vendors' performance and quality assurance are and will be

reviewed on weekly, monthly, quarterly, and yearly basis to maximize the return on investment and adapt activities if needed.

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

Our expectation is to view proposals that are based on:

- Number of new donors
- Attrition <20% after three months and <40% after 12 months
- Donor segments: donors above 30 years of age.
- Average donation amount is currently €11, -. We expect an offer based on this average.
- Age distribution – normal distribution (mathematical term)
- Opt-in percentages >90%
- Storno
- Data quality – no missing data
- Verification processes – reach of the verification call, sms signature possible

Bidders are requested to include all the information above in 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 the number of donors to be acquired per year. We also desire to know the maximum (but realistic) capacity, even if it is lower or higher than the set figures.

1.3 Pre-selection criteria

Only companies compliant with the above mandatory pre-selection criteria will be considered as eligible for technical evaluation.

Please fill in Annex B Technical response form for pre-selection

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Eligible to provide service in the Netherlands	<p>To establish compliance with these criteria:</p> <ul style="list-style-type: none"> • Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent* • Vendor registration form to be filled out and submitted (Annex C)* <p><i>* In case your company is a registered (PO supplier) to UNHCR Netherlands, i.e., you have already received purchase orders, there is no need to re-send the above documents unless some changes are to be implemented on your current profile (address, bank account etc.). Please add the necessary comments to your technical offer. Compliance with the rest of the pre-selection criteria is still mandatory.</i></p>
Compliance with UNHCR general terms and conditions for provision of service	<p>Please accept UNHCR general terms and conditions in its entirety (Annex D).</p> <p>Your acceptance is to be confirmed on Annex B Technical response form for pre-selection.</p>
Compliance with UN code of conduct	<p>Please accept UN Code of conduct in its entirety (Annex E).</p> <p>Your acceptance is to be confirmed on Annex B Technical response form for pre-selection.</p>

Compliance with UNHCR Special Data Protection Conditions	<p>Acknowledge the Supplementary Agreement on protection of personal data (Annex F) and send along with your proposal. Your acknowledgement is to be confirmed on Annex B Technical response form for pre-selection.</p> <p><i>This agreement will be tailored made and signed with the selected company, as part of the frame agreement during the contract establishment phase.</i></p>
Minimum capacity of donor acquisition per annum	<p>Your company must have the capacity and capability to recruit a minimum of 1500 new donor per year.</p> <p>Please provide at least one reference letter or contact information from your current/previous clients to be contacted by UNHCR to confirm the past year 2024 or 2023 performance in this regard. Without this reference and confirmation on your company's performance to hire at least 1500 new donor a year, your offer will not pass the pre-selection.</p>

1.4 Joint venture, subcontracting

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company takes responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winning bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

2 Requirements

2.1 F2F fundraising donor acquisition services

- Conduct the F2F fundraising services via Door-to-Door channels to solicit monthly regular giving donations.
- Conduct the F2F fundraising campaigns at events, businesses, and targeted public sites to solicit regular giving (i.e., monthly) donations. (Please see specifications in requirements below).
- Contractor(s) will be required to deploy at the request of UNHCR team(s) of suitable competent persons with relevant expertise to perform the F2F donor acquisition services (preferably no freelance canvassers).

2.2 Staff administration

We expect:

One (1) Chief Executive / Senior Manager to:

- Lead to maximize goal achievement that is mutually agreed between the Contractor(s) and UNHCR.

One (1) Project Manager for UNHCR to:

- Serve as a focal point to oversee the effective implementation of the F2F programme.
- Serve as day-to-day contact person for UNHCR on any operational questions or requests

One (1) Team Leader per team to:

- Train and motivate junior personnel (Canvassers) in all aspects of fundraising
- Create fundraising plans and help implement and evaluate those plans
- 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.

Contractor(s) will be required to mobilize enough operation support staff to provide the services.

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

Recruitment of Staff

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

Staff Administration

- Monitors the attendance, performance and conduct of staff involved in the UNHCR F2F programme.

Training

- Induction training to all newly recruited F2F programme staff.
- Provides regular training for all fundraisers.
- Provides 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 and approval.

Performance Assessment

- Conducts daily performance assessments of fundraisers by team leader(s).
- Conducts daily and weekly performance assessments of team leader by Manager(s) in charge of F2F for UNHCR.
- Conducts regular on-site supervision by appropriate Manager(s) in charge.

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 programme.

Reporting

- Prepare and share reporting to UNHCR concerning progress and recruitment performances including, but not limited to, the requirements mentioned under 2.4 Reporting.

Welcome/verification call

UNHCR prefers to outsource the verification calls with an external party. Only on high exception, agencies can make a request to do the verification calls themselves.

Please provide a detailed description on the process of the verification call for UNHCR to further inspect if your process will meet up to the current standard. UNHCR will always retain the right to appoint an external agency for the verification calls.

2.3 Logistics arrangement supporting F2F operation

- Plans for and arranges locations for all F2F teams.
- Prepares and submits F2F operation proposals to UNHCR for consideration and approval.
- Prepares and submits applications to obtain approval and all relevant permits from all concerned parties.
- Coordinates and manages 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.
- Provides identification badges for the F2F programme staff.
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- The Contractor(s) will pay for event locations which are not provided free of charge; however, the provision of financial support may be considered under the decision of UNHCR.
- 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.
- UNHCR will not be able to answer any fines that the agency received for recruiting in an area where this is forbidden.

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 always be accounted for.
- 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 three (3) working days.
- All donation forms are digital. Paper donation forms will not be accepted.

2.4 Reporting

- The use of the DDDN planning tool is mandatory.
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- Prepares and submits weekly, and monthly reports of donor acquisition results. This should include but should not be limited to:
 - Quality of recruitment on location and fundraiser level:
 - Inflow per fundraiser/location + per age group (weekly/monthly).
 - Outflow (attrition) per fundraiser/location + per age group (weekly/monthly).
 - Dashboard/report on a weekly basis about good/bad performing fundraisers.

- Provides verbal reports of any misconduct or complaint received regarding staff engaged in UNHCR's F2F activities as soon as practicable and written reports with actions taken and/or proposed remedy to UNHCR within three (3) working days.
- UNHCR retains the right to appoint mystery shopping or perform mystery shopping themselves.

3 Customer Responsibilities

UNHCR is responsible for providing the following:

- Content for fundraising materials.
Please note: designing, printing and delivering acquisition materials will be the responsibility of the Contractor.
- 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.

4 Content of the Technical Offer

To ensure a fair and transparent technical assessment, please **DO NOT** include any financial information in your technical proposal. Including information on pricing in the technical proposal will lead to disqualification.

Your proposal is to be prepared English.

Please fill in Annex G your technical response form to ease the evaluation.

4.1 *Company Qualifications*

It is considered essential for the bidder to comply with the following requirements to participate in this RFP. During the technical evaluation, in this section, the panel will score your company's relevant experience in F2F donor acquisition services, in terms of previous campaigns, number of clients and fundraising experience in the Dutch non-profit landscape

4.2 *Proposed Services*

During the technical evaluation, in this section, the panel will score your company's compliance regarding the required services listed under section 2.

4.3 *Account management*

During the technical evaluation, in this section, the panel will score the number of locations and canvassers.

5 Evaluation

5.1 Technical evaluation

Companies compliant with the pre-selection criteria will be further evaluated; please refer to section 1.3.

The Technical offer will be evaluated using 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 12.5 points)	Documents, information to be provided to establish compliance with the set criteria
Demonstrated commitment or efforts to integrate and implement sustainable practices in the company's current operations (max 2.5 points)	<p>The organization demonstrate ability to integrate and implement sustainability measures in the execution of the contract including but not limited to:</p> <ul style="list-style-type: none"> The bidder shall provide a description of the company's commitment to reduce the environmental impact of their operations (half A4 page or 1-2 slides) The bidder demonstrates gender-balanced project team (i.e. practices, policies, or initiatives) The bidder demonstrates commitment with disability inclusion in their operations (i.e. disability inclusion policy, practices, or quota). The bidder ensures that contractor (s) in the joint venture and/or subcontractors implement sustainability and ethical practices in line with UN Supplier Code of Conduct) Other sustainable practices
Number of clients in the Dutch non-profit landscape (10 points)	Please provide the list of current and previous clients from the non-profit sector. The scores will be allocated for the number of clients listed.
Proposed Services (max 45 points)	Documents, information to be provided to establish compliance with the set criteria
Capacity and experience to acquire quality donors to achieve long-term commitment (max 35 points)	<p>Offer submitted clearly describes key elements (age distribution, clawback procedure, door to door fundraising, verification process, opt-in percentages for phone and email, no extensive offer for recruitment of donors per year) of a sound strategy to recruit high quality donors, committed to make a long-term monthly contribution and complies with all requirements listed. Please describe the successful campaigns carried out in 2023 and 2024.</p> <p>Please provide projection for the upcoming three years in terms of expected gross donor number, average monthly donation, and corresponding attrition rates (pre-debit, 3-6-12 months basis); based on realistic capacity / availability, even if it is higher or lower than UNHCR requirements.</p> <p>The proposed figures must be supported by:</p> <ul style="list-style-type: none"> evidence from past performances strategy to achieve them market average (to check how your company is performing against market average) <p>KPIs can be presented on an aggregated level:</p> <ul style="list-style-type: none"> Average monthly donation

	<ul style="list-style-type: none"> • Age distribution • Opt-in percentages • 3- and 12-month attrition • Storno • Data quality • 30+ age percentage <p>The scores will be allocated based on the clarity and quality of the proposed services as added value to UNHCR work.</p>
Any innovative idea, strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate (max 10 points)	<p>Idea submitted provides clear ideas of new approaches to recruit high quality donors, committed to make a long-term contribution, leading to reduction of attrition rate.</p> <p>The scores will be allocated based on the clarity and quality of the proposed services as added value to UNHCR work.</p>
Account management (max 12.5 points)	Documents, information to be provided to establish compliance with the set criteria
Number of locations (5 points)	<p>Please list on your technical response form the number of locations and the year of establishment of those locations.</p> <p>Score will be allocated for the number of locations your company can run campaigns.</p>
Number of canvassers (frontliners) (7.5 points)	<p>Please list the number of active canvassers (frontliners) your company can allocate to UNHCR campaigns.</p> <p>Score will be allocated for the number of canvassers (frontliners).</p>

The minimum passing score of the evaluation is 45 out of 70; if a bid does not meet this minimum, it will be deemed technically non-compliant and will not proceed to the financial evaluation.

5.2 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 H**. No other format will be accepted.

The following information needs to be entered:

- Average donation per donor per month for the period indicated
- Pre-debit attrition (%) (the attrition happening after delivery to UNHCR and before the 1st debit.)
- 3-months attrition (%) (the cumulative attrition happening after the 1st debit)
- 6-months attrition (%) (the cumulative attrition happening after the 1st debit)
- 12-months attrition (%) (the cumulative attrition happening after the 1st debit)
- Cost per donor, cost per acquisition (CPD, CPA) including clawback

Please be noted that a clawback system must be in place since the beginning of the cooperation between UNHCR Netherlands and the service provider. The clawback calculation will be included into the cost and has impact on the final CPA figures, used for ranking.

The financial comparison will be based on projected cumulative net income on a 60-month basis using the following inputs:

- investment fund of approx. Euro 500,000 per annum
- Average donation per donor per annum as provided on Annex H
- 12-months attrition (%) (the cumulative attrition happening after the 1st debit) as provided on Annex H

- **Cost per donor, cost per acquisition (CPD, CPA) including clawback for the minimum 1500 per annum as provided on Annex H**

The maximum number of points (30) will be allotted to the highest expected, cumulative net income on a 60-month basis. All other price offers will receive points in inverse proportion.

Important note: bidders are requested to project cost for the different phases, considered inflation rate and all associated cost fluctuation. Fee may vary on annual basis. The winner companies will be requested to keep the proposed fees unchanged for the duration of the contract.

Bidders will be rank financially based on the submitted cost model. To stay compliant with the principle of fairness, integrity and transparency, the financial offer must cover all the services to be provided (price "all-inclusive"), meaning that no further cost will be absorbed by UNHCR in case of selection. The financial offer form will be the price list attached the signed contract.

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 monthly, but not exclusively, according to the following KPIs:

- Cost per donor
- Donors per month
- Monthly donation
- Monthly attrition rates
- ROI & LTV
- Age distribution
- Opt-ins