

**ANNEX A: TERMS OF REFERENCE
CANTO/RFP/PSP/2017/003
FOR THE PROVISION OF F2F ACQUISITION SERVICES IN CANADA**

25 September 2017
Reference: CANTO/RFP/PSP/2017/003

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1 Introduction

1.1 Background

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 people to restart their lives. Today, UNHCR is one of the world's principal humanitarian Agencies. Its staff of more than 9,000 personnel is helping more than 55 million people in 125 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see <http://www.unhcr.org>.

In 2013, UNHCR Canada tested the face to face (F2F) fundraising program which showed positive results. Since then the office has been running F2F fundraising and this method has proven to successfully generate monthly donors for UNHCR. As part of the global UNHCR Strategy, we want to continue our fundraising efforts in Canada in 2018 and the following years through F2F fundraising. The office is now opening this RFP to recruit agencies to provide F2F fundraising services in Canada.

UNHCR expects the winning Agencies of this RFP to be able to provide services starting in January 2018.

1.2 Statement of Purpose & Objectives

The purpose of the present RFP is to establish a Long term Agreement (LTA) with **more than one** F2F agency to support UNHCR Canada in the recruitment of quality new monthly donors through F2F fundraising.

The contract phase is planned from January 2018 to December 2019 (two-years) and potentially extendable for a further period of one year (three year contract). The successful bidders will be requested to maintain their quoted price model for the duration of the contract.

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

- Minimum objective¹:
 - UNHCR expects to achieve the following minimal cumulative Return on Investment (ROI):
 - Year 1: 0.7
 - Year 2: 1.5
 - Year 3: 2.2
 - To achieve these ROI figures, a combination of the following must be met:
 - Average monthly donation must be at least CAD 20 per month;

¹ Please note that these numbers are UNHCR estimation based on PSP annual plan. Vendors are requested to prepare their bids based on their realistic capacity / availability, even if it is higher or lower than UNHCR requirements.

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- The winning F2F Agencies must achieve a minimum total of 4,000 new monthly donors in each year (2018, 2019 and 2020)
 - Achieve a Cost to Acquire figure that will correspond with metrics stated above
- Donations and pledges are to be factored into the technical and financial proposals in the following terms:
 - Pledge: A potential new donor has been signed up by a F2F Fundraiser—a donor form for a monthly donation is completed. It will remain a pledge until the 1st donation is processed and confirmed by UNHCR's donation processing platform;
 - Donor: A donor who has made at least 1 successful donation (donation has been successfully confirmed by UNHCR's donations processing platform)
- Attritions are to be estimated and factored into the technical and financial proposals in the following terms:
 - Pre-debit attrition: % of pledges that do not convert into donors because the 1st donation is not processed successfully
 - 3 month attrition: % of donors who stop their donations after three months;
 - 6 month attrition: % of donors who stop their donations after six months;
 - 12 month attrition: % of donors who stop their donations after 1 year;
- Our expectation is to reach a minimum return on investment of 0.7:1 within 12 month based on:
 - Total income (factoring attrition)
 - Total cost
- Financial proposal will be evaluated on the basis of the **cost per donor**.

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2 Requirements

2.1 Core requirements

The F2F Agencies will need to deliver the following:

- Conduct F2F fundraising campaigns at events, businesses, and targeted public sites (street, door, airports, malls) to solicit regular giving (i.e. monthly) donations.
- Collect donations in the form of a pledge by a donor to have an amount deducted from the donor's credit card or bank account and paid into UNHCR bank account.
- F2F Agencies will be required to deploy, at the request of UNHCR team(s) of suitable competent persons with relevant expertise, (hereinafter referred to as "Fundraisers and "Team Leader") to perform the F2F services.
 - At least one (1) Team Leader to:
 - Assist in conducting feasibility studies;
 - Train and motivate Fundraisers in all aspects of fundraising; and
 - Create fundraising plans and implement and evaluate those plans
 - At least three (3) Fundraisers to:
 - Execute the strategies and proposal to recruit individual donors in the form of regular monthly givers.
- Identify an Account Manager(s) to serve as a focal point to oversee the effective implementation of the F2F program. The F2F Agencies will be required to mobilize sufficient numbers of operation support staff to provide the service.
- Any adjustment on the number of target donors to be acquired shall be mutually agreed by both UNHCR and the F2F Agencies prior to the execution of the contract and subject to revision every four (4) months.

2.2 Other Services, required for the performance of the key requirement

The F2F Agencies are expected to provide the following services based on the above mentioned conditions:

2.2.1 Recruitment of Staff

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

2.2.2 Staff Administration

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

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compensation arrangements comply with the local legislation in Canada.

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

2.2.3 Logistics Arrangement that Supports the F2F Operation

- Plans and applies for locations for all F2F teams;
- Obtains prior approval for paid venues that require reimbursement from UNHCR;
- The F2F Agencies agrees not to provide services to recruit donors for parties other than UNHCR if the recruitment site is obtained by virtue of a UNHCR partnership;
- Prepares and submits operation proposals to UNHCR for consideration and approval;
- Manage the flow of resources including but not limited to pitch cards, leaflets, donation forms, banners and uniforms to support the F2F fundraising services;
- Provides marketing materials including but not limited to identification badges, tables, chairs and presentation materials for the F2F fundraising services;
- Obtain all permits, licenses and/or consents required under its articles of association and prevailing laws and regulations to perform its business activities, and to execute and deliver these services.

2.2.4 Control and Submission of Donation Forms and backend process

- Each donation form should carry a unique serial number and should be strictly controlled by the F2F Agencies;
- All donation forms must be accounted for at all times;
- Donation forms should be assigned to Fundraisers with records and are all returned to the Team Leader or the F2F Agencies daily;
- Ensures that donation forms are accurately completed and signed by the donors;
- Ensures that all completed or voided donation forms are returned to UNHCR within five (5) working days.
- If using electronic devices to capture donation, ensure that all is set up correctly and coordinate the backend process with UNHCR's donation processing vendor.
- Data entry and daily processing: Including registering forms and transferring the data electronically to UNHCR's data house directly for uploading into its donor database, gift processing.

2.2.5 Training

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

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- Provides special training for team leaders;

2.2.6 Motivation

- Plans, develops and maintains motivation schemes as deemed appropriate;
- Prepares and submits proposal for motivation schemes to UNHCR for consideration and approval;
- All incentive for motivation schemes should be covered in your financial proposal (price “all inclusive”).

2.2.7 Performance Assessment

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

2.2.8 Monitoring Staff Conduct

- Ensures that no F2F program staff engages in any misleading or deceptive conduct;
- Ensures that apart from completing the donation forms, no F2F program staff accepts any form of donations including but not limited to cash and gifts;
- Ensures that no F2F program staff commits any act which may compromise the image and interests of UNHCR;
- Ensures that all staff members comply with applicable laws and regulations whilst carrying out activities in relation to UNHCR's F2F fundraising services.

2.2.9 Analysis and Reporting

- Prepares and submits monthly location plans for all F2F teams;
- Informs UNHCR of any change of location within the same day;
- Prepares and submits weekly and detailed quarterly reports of F2F results;
- Provide reports to measure key performance indicators (KPIs) including but not limited to average sign up rate, average monthly donation, age distribution of donors, payment method to monitor overall, team, fundraiser performances and location differences;
- Provides reports to analyze the performance of testing strategies and introduction of new measures;
- Provides a verbal report of any misconduct or complaint received in regard to staff engaging in UNHCR's F2F activities as soon as practicable and a written report with

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actions taken and/or proposed remedy to UNHCR within 3 working days; and

- Arrange monthly and quarterly face to face meetings with UNHCR.

2.2.10 Welcome Package

- Develop (with UNHCR) a welcome package, laser printing and delivery to donor (by Fundraisers)

2.2.11 Welcome call and on-going reactivation calls

- Provide welcome call to newly recruited donors and welcome email if using hand-held device
- Reactivation calling to donors who fail to make a transaction

2.3 Customer Responsibilities

UNHCR is responsible for providing the following:

- Designing and printing acquisition materials including pitch cards, leaflets, donation forms, uniforms, lanyards and banners;
- Providing information, documents, materials and assistance reasonably necessary to enable F2F services to be provided including but not limited to:
 - o Education and training as reasonably required by the F2F Agencies; and
 - o Materials for the F2F Agencies to develop marketing collaterals (e.g. folders with UNHCR logos and artwork or any other material).

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3 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

3.1 Company Qualifications

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal):

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

3.2 Proposed Services

- A description of the fundraising plan to recruit minimum 4,000 quality monthly donors per year (location and channels such as door, street, venues) and a description of the services offered, in tandem with other partners, third party suppliers, F2F Agencies (if applicable);
- A description of current systems in place such as recruitment, training, database, design and material development, complaint handling mechanism;
- Outline of strategy for recruiting high quality donors and committed to make long-term monthly contributions;
- A description of your experience in recruiting monthly donor through street, door and soliciting and setting up indoor venues. Please provide example(s);
- A description of reports and key performance indicators (KPIs) that will be used to measure the services offered; and
- Any other services offered that bring value to F2F service.

3.3 Personnel Qualifications

- The composition of the team you propose to provide;
- Curriculum Vitae of the core staff.

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3.4 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).

3.5 Applicable Conditions

Please indicate your acknowledgement of the **UNHCR General Conditions of Contract for the Provision of Services (Annex D)** on the RFP Checklist Form (Annex H) and including it in your submitted Technical Proposal.

Please also indicate your acknowledgement of the **UNHCR Special Conditions for Fundraising Activities (Annex E)** on the RFP Checklist Form (Annex H) and including it in your submitted Technical Proposal.

Please also indicate your acknowledgement of the **UNHCR Special Data Protection Conditions (Annex F)** on the RFP Checklist Form (Annex H) and including it in your submitted Technical Proposal.

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4 Evaluation

4.1 Technical Evaluation

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

	Points obtainable
1. Company Qualifications (20%)	<ul style="list-style-type: none"> General Liability/ Capacity of the Company (10%) Overall F2F fundraising experience/time in business, including non-profit knowledge market (10%)
2. Quality of Service (40%)	<ul style="list-style-type: none"> Comprehensive of presented proposal (10%) Strategy of recruiting high quality donors and committed to make long-term monthly contributions (10%) Clarity/quality of interpreting and presenting fundraising services as described in TORs (10%) Capacity to achieve the UNHCR proposed results. Experience with similar projects and campaigns (10%)
3. Project Staff (10%)	<ul style="list-style-type: none"> Experience of core people who will work on UNHCR project. (Including experience with similar projects) (10%)
Total:	Maximum Total Score 70%

Agencies will be asked to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via web/teleconference.

The minimum passing scores of the evaluation is 49 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.

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5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis.

KPI's will be:

- Number of donors recruited per month compared to target
- Attrition rates
- Average monthly donation
- Expected age of new donors
- ROI
- Cost per donor
- Live Time Value forecast
- Number and gravity of complaints received about conduct of the fundraisers
- Performance by channel (street, door, venue) and by location

Please note that budget allocation cannot be revealed by UNHCR at this point of time, but will be disclosed to the successful F2F Agencies.