



Annex A: Terms of Reference

RFP/24/001/RBAP/PSP

**Request for proposal for establishing Frame Agreement for staff administration
services for UNHCR Philippines Private Sector Partnerships Unit**

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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. Our primary purpose is to safeguard the rights and well-being of people who have been forced to flee. They include refugees, returnees, stateless people, the internally displaced and asylum-seekers. For 70 years, UNHCR has helped millions of people to restart their lives. Our protection, shelter, health, and education has been crucial, healing broken pasts and building brighter futures.

UNHCR has been operating in the Philippines for over 30 years. For many years, its presence was limited to Manila with a focus on asylum seekers, refugees, and statelessness. In May 2010, with renewed dialogue between the government & armed groups, UNHCR established its presence in Mindanao to address issues on internal displacement.

The Private Sector Partnership (PSP) team of the UNHCR Philippines raises awareness on refugee issues and asks individuals to financially support UNHCR's programs through professional Face-to-Face (F2F) interactions with members of the public and other fundraising channels. This has been done since 2014 as part of a global UNHCR strategy of awareness raising and increasing private sector funding.

In the Philippines, the PSP team started in 2014 and has since engaged over 50,000 individual donors, majority of whom are signed up through F2F. Despite interruptions of the program during the prevailing pandemic, F2F remains to be the main donor acquisition channel in UNHCR's Individual Giving strategy in the coming years.

UNHCR Philippines seeks to work with a new F2F service provider in the market to augment the current capacity in place. This engagement is planned to commence in April 2024.

1.2 Statement of Purpose & Objectives

To achieve cost efficiency whilst ensuring quality service, UNHCR is seeking to appoint a provider for staff administration support services for In-House F2F fundraisers and telefundraising agents in the Philippines.

PSP Philippines is looking for a qualified vendor to establish a frame agreement with one year, potentially further extendable twice for a period one year, subject to satisfactory performance (1+1+1).

The supplier must have proven experience and expertise in comprehensive staff administration services including **individual contractors contract management, payroll service and group health insurance**. The confirmed service fees will be maintained for the duration of the contract.

The expected number of fundraisers to be administered is listed below.

| | Face-to-Face fundraisers | Tele-Fundraisers | Total |
|--------|--------------------------|------------------|-------|
| Year 1 | | | |

| | | | |
|------------------------------|----|---|----|
| Total individual contractors | 20 | 5 | 25 |
|------------------------------|----|---|----|

| | Face-to-Face fundraisers | Tele-Fundraisers | Total |
|------------------------------|--------------------------|------------------|-------|
| Year 2 | | | |
| Total individual contractors | 30 | 10 | 40 |

| | Face-to-Face fundraisers | Tele-Fundraisers | Total |
|------------------------------|--------------------------|------------------|-------|
| Year 3 | | | |
| Total individual contractors | 40 | 15 | 55 |

1.3 Pre-selection Criteria

Please take note of the pre-qualification criteria hereunder, failure to comply with the below criteria will result in disqualification:

1. **Locally based and registered:** your company must be registered in the Philippines and licensed to provide staff administration services. To establish compliance, please send your company registration certificate.
2. **Personal data protection policy:** your company must have such policy in place. In case of any certificate, please attach it to your technical proposal.
3. Acceptance of **UNHCR general terms and conditions** (Annex D)
4. Acceptance of **UNHCR data protection clause** (Annex E)
5. Acceptance of **UN Suppliers Code of Conduct** (Annex F)
6. Provision of **all government mandated benefits and contributions;** please submit your health insurance benefit/package you offer.

2 Requirements

2.1 Provider Responsibility

- Entirely prepare and manage profile registration per UNHCR selection and collect documents to comply with UNHCR guidelines and the most recent update on labor laws in the Philippines.
- Issue a staff contract between the service provider and the selected candidate and discontinue staff contract according to the instruction of UNHCR based on existing policies and guidelines
- Prepare accurate salary reports in a professional and timely manner.
- Issue salaries pay slips for employees (electronic file and/or carbon slips)
- Manage entire employee resignation process including determination of contracts, health insurance and settle their End of Service benefits per UNHCR instruction in accordance with existing policies and guidelines.
- Provide individual contractors retention reports with accurate data on entry on duty, and last working day.
- Provide Employment Certificate if requested by the employee.
- Provide Monthly, Quarterly and Yearly Payroll Service and F2F Fundraiser Retention reports per UNHCR guidelines

Important note 1: any fees related to termination must be stated in the proposal and reflected in the financial form (Annex B)

- Prepare invoicing fundraisers travel cost (as needed); tickets, accommodation, local transportation, incentives in a timely manner.
- Prepare invoicing operational payment cost; rental office, venue payment, uniforms, equipment (including booths) and vendors payment in a timely manner.
- Fully manage employee health insurance including providing necessary notifications and health insurance reports to newly hired, existing, resigned and terminated employees.

Important note 2: UNHCR shall inform all candidates, before their recruitment, that no contractual relation (such as employer–employee) exists between the employee and UNHCR. The contract is to be signed between the selected candidate and the service provider. UNHCR would not be liable to the selected face to face fundraiser staff for any sort of compensation, and UNHCR is protected by its privileges and immunities.

2.2 Medical Insurance Minimum Requirements

| Area of cover | Philippines Nationwide |
|--|------------------------|
| Daily Room and Board – Regular Private -Max. Benefit Limit (MBL) | PHP 100,000 (MBL) |
| Death Benefit | PHP 50,000 |
| Accidental Death and Dismemberment of benefit | PHP 50,000 |
| Dental Care | Covered |
| IPD | |
| 1. Daily room & board | Covered subject to MBL |

| | |
|--|-------------------------|
| 2. I.C.U. | Covered subject to MBL |
| 3. Miscellaneous Hospital Expenses | Covered subject to MBL |
| 4. Surgical Fees | Covered subject to MBL |
| 5. In-Hospital Physician's Visits and Services | Covered subject to MBL |
| 6. Emergency outpatient treatment | Covered |
| 8. Ambulance service fees | Covered |
| Outpatient benefit | |
| Outpatient prescribed medicine | Covered up to PHP 1,000 |

2.3 Customer Responsibilities

Appointed agency will work closely with UNHCR Philippines' PSP unit where UNHCR will be responsible for:

- Provision of Administrative support to the service provider to create employee contract for the selected candidates
- Provision of Terms of Reference for different positions
- Provision of salary and incentive calculations for payroll services
- Provision of Entry and Exit working date information
- Provision of payment of fundraisers travel cost during team travel (if needed); tickets, accommodation, local transportation and incentive reward
- Provision of payment operational cost; rental office and equipment's, venues and vendors payment (loading/unloading).

3 Content of the Technical Offer

Please fill out Annex B your technical response form.

Your proposal must be presented in English. Do not include any information from your financial offer in your technical proposal. Financial information in the technical proposal may lead to disqualification.

Please note that only companies passing the pre-selection (section 1.3) will be eligible for technical evaluation.

3.1 Company Qualifications

During the technical evaluation, in this section, the panel will score your company's (1) similar service provision experience based on number of projects and (2) similar service provision experience based on number of clients:

(1) Service provision experience in staff administration services, based on the number of projects:

- Please describe the number of similar and successfully completed projects.
- Please describe the number of projects currently underway.

(2) Service provision experience in staff administration services, based on number of clients:

- Please list the number of current and previous clients.
- Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *your company's compliance with the services required under administration services*; and (2) *your company's compliance with the services required under specialized services personnel management (2.2); and (3) reporting capabilities*:

- Please include your company policy, Code of Conduct and the terms of conditions related the requested services.
- Sample reports to be provided:
 - ✓ One (1) employee contract template.
 - ✓ One (1) monthly salary report upon payroll completion
 - ✓ One (1) sample of individual contractor's retention report

3.3 Personnel Qualifications

Account management is crucial for a successful cooperation. This section is dedicated to measure the proposed customer service towards UNHCR Philippines. 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 provide a short CV (max half page) of the key personnel assigned to UNHCR account.
- A description of each team member's role within your firm proposed to carry out the services.

Please make sure you elaborate on this section properly, to understand the level of support proposed for managing our account.

4 Evaluation

4.1 Technical Evaluation

The overall evaluation is based on a 100 points scale. The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution; **60% (i.e., max 60 points)** from the total score.

| 1. Company Qualifications (20) | Documents, information to be provided to establish compliance with the set criteria |
|--|--|
| Service provision experience (<u>project based</u>) (10) | <p>Service provision experience in administrative services. List the number of projects with short description successfully completed and currently under-way.</p> <p>Scores will be given based on the number of relevant projects.</p> <p><i>Please note that without the list of projects, 0 point will be given.</i></p> |
| Service provision experience (<u>client based</u>) (10) | <p>Service provision experience in administrative services.</p> <p>Please list the current and previous clients. Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted.</p> <p>Reference and background checks are part of the due diligence during the selection process and in case of negative feedback may lead to disqualification.</p> <p><i>Please note that without the list of clients, 0 point will be given.</i></p> |
| 2. Proposed services (30) | Documents, information to be provided to establish compliance with the set criteria |
| Compliance with the services required under administrative services (2.1) (15) | <p>Comprehensive proposal presented including all services listed under point 2.1., outlining your company`s experience and strategy to fulfil requirements; please outline ability/capacity to provide timely hiring services.</p> <p>Please include your company policy, Code of Conduct and the terms of conditions related the requested services.</p> <p><i>Please note that if you don't add information about this section on Annex B, 0 point will be given.</i></p> |

| | |
|---|---|
| Reporting capabilities (15) | <p>Sample reports to be provided:</p> <ol style="list-style-type: none"> 1. One (1) employee contract template. 2. One (1) monthly salary report upon payroll completion 3. One (1) sample of individual contractor's retention report <p>The scores will be allocated for the quality of the samples.</p> <p><i>You are requested to add all the three samples to your proposal. Please note that without the samples, 0 point will be given.</i></p> |
| 3. Personnel qualifications (10) | <p>Documents, information to be provided to establish compliance with the set criteria</p> |
| Experience of core people who will work on UNHCR project. | <p>UNHCR requires a designated account manager to handle day to day interactions. Please provide a short CV (max half page) of the account manager assigned to UNHCR account;</p> <p>The scores will be allocated for the average number of years` of the account manager dedicated to UNHCR account.</p> <p><i>Please note that without the CV, 0 point will be given.</i></p> |

The minimum passing score of the evaluation is 45 out of 60; if a bid does not meet these minimums, it will be deemed technically non-compliant and will not proceed to the financial evaluation.

4.2 Financial evaluation

The financial component is 40% (i.e., 40 points) of the total score. The maximum number of points (40) will be allocated to the lowest price offer. All other offers will receive points in inverse proportion to the lowest price.

Important notes: Only Annex C will be accepted for confirming your fees.

Financial Offers must contain an overall offer in a single currency, which shall be Philippine Peso (PHP). The financial offer is based on the two main requirements:

- 1. Administrative services cost:** continuous service cost to be paid to the selected vendor, based on individual contractor's member quantity, as fixed rate per person per month or % charged.
- 2. Health Insurance of the 3rd party:** continuous service cost or one-off cost based on the number of individual contractors; for volume, please refer to UNHCR estimation confirmed on page 4.

Payment terms:

1. Health Insurance cost: once the insurance has been completed, the corresponding one-off costs are to be invoiced

2. Administration service cost: this is to be invoiced and paid on monthly basis

5 Key Performance Indicators

5.1 *Performance Evaluation*

UNHCR PSP Philippines expects to monitor the performance of the selected supplier according to a pre agreed KPI's:

- Account management
- Response time
- Quantity of the individual contractors
- Quality of the work of the designated team for UNHCR services