

DATE: 6 September 2021

REQUEST FOR PROPOSAL: ROK/RFP/PSP/2021/006

FOR THE ESTABLISHMENT

OF A FRAME AGREEMENT FOR THE PROVISION OF

FACE TO FACE RECRUITMENT AND RETENTION SERVICES

IN THE REPUBLIC OF KOREA

CLOSING DATE AND TIME: 6 Oct 2021 – 23:59 hrs KST (Korea Standard Time)

INTRODUCTION TO UNHCR

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

In more than seven decades, UNHCR has helped tens of millions of people restart their lives. To help and protect some of the world's most vulnerable people in so many places and types of environment, UNHCR must purchase goods and services worldwide. For further information on UNHCR, its mandate and operations, please see <http://www.unhcr.org> or www.unhcr.or.kr.

1. REQUIREMENTS

The Office of the United Nations High Commissioner for Refugees (UNHCR), in Seoul, Republic of Korea (ROK), invites qualified service providers to make a firm offer for the establishment of Frame Agreement(s) for the provision of donor recruitment services and donor retention services of UNHCR Korea's outsourced Face-to-Face fundraising program starting as of 1 Jan 2022 in the Republic of Korea.

The Frame Agreement will be signed with one or more successful bidders for a period of three (3) years:

- Phase 1: 1 Jan 2022 to 31 Dec 2022 (1 year)
- Phase 2: 1 Jan 2023 to 31 Dec 2023 (1 year)
- Phase 3: 1 Jan 2024 to 31 Dec 2024 (1 year)

The successful bidder(s) will be requested to maintain their quoted price model for the duration of the Frame Agreement.

IMPORTANT:

Terms of Reference (TORs) are detailed in Annex A of this document.

The estimated annual requirement of UNHCR is detailed in Terms of Reference (TORs) – Annex A of this document.

Please note that figures have been stated in order to enable bidders to have an indication of the projected requirements. Quantities may vary and will depend on the actual requirements and funds available regulated by issuance of individual Purchase Orders against the Frame Agreement.

Sub-Contracting: Please take careful note of article 5 of the attached General Terms and Conditions (Annex D).

Note: this document is not construed in any way as an offer to contract with your firm.

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form integral part of this Request for Proposals:

- Annex A: Terms of Reference
- Annex B: Financial Offer Form for LOT A & LOT B
- Annex C: Vendor Registration Form
- Annex D: UNHCR General Conditions of Contract for the Provision of Services
- Annex E: Special Terms and Conditions for F2F Fundraising Activities
- Annex F: Special Data Protection Conditions
- Annex G: eTenderbox Registration Guide
- Annex H: eTenderbox User Manual

It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Please take careful note of article 5 “Subcontracting” of the attached General Conditions of Contracts.

2.2 ACKNOWLEDGMENT

We would appreciate your informing us of the receipt of this RFP by return e-mail to Mathieu Mal at mal@unhcr.org and to Goran Stojanovski at stojanov@unhcr.org as to:

- Your confirmation of receipt of this invitation to bid
- Whether or not you will submit any proposal

2.3 REQUESTS FOR CLARIFICATION

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to rbapsupply@unhcr.org with copy to mal@unhcr.org. **Deadline for receipt of questions is on 19 September 2021 23:59 KST.** Bidders are requested to keep all questions concise.

IMPORTANT:

Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than the submission e-mail address will result in disqualification of the offer. Please send your bid directly to the address provided in the "Submission of Bid" section 2.6) of this RFP.

UNHCR will compile the questions received and plans to publish them on UNGM website and directly send to all bidders that have expressed interest by 29 Sep 2021. UNHCR may, at its discretion, copy any reply to a particular question to all other invited bidders at once:

2.4 YOUR OFFER

Your offer shall be prepared in English (mandatory) and Korean (optional).

Please submit your offer using the Annexes provided. Offers not conforming to the requested formats may be not taken into consideration.

Your offer shall comprise the following documents:

- Technical offer
- Financial offer (Only offers made in the format of Annex B will be accepted)

2.4.1 Content of the TECHNICAL OFFER for F2F Fundraising Recruitment Services (LOT A)

IMPORTANT:

No pricing information should be included in the Technical offer. Failure to comply may risk disqualification. The technical offer should contain all information required.

The Terms of Reference (TORs) of the services requested by UNHCR can be found in **Annex A**. Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

Company Qualifications

- General Liability and Capacity
 - Company profile
 - Registration certificate
 - Year founded
 - If a multi-location company, please specify the location of the company's headquarters and the branches with founding dates
 - 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;
- Fundraising experience in the business or the number of similar and successfully completed projects to donor acquisition process;
- Any relevant experience working with UNHCR Korea, other UN Agencies and NGOs will be an asset, all information should be included;
- Detailed performance results such as average DPR and average age will also be an asset in the description of past and current experience.
- Total number of clients, please provide a list and their contact information.

Proposed Services

- Quality/clarity of interpreting and presenting F2F fundraising services as described in Point 2 "Core Requirements" of TORs.

- A clear and detailed description on whether the elements under Point 2 “Core Requirements” of TORs can be executed or not with valid reasons.
- A description of current systems in place that gives a clear picture and idea of the vendor’s operating system and structure.
- A table that well shows the vendor’s campaign plan during phase 1, 2 and 3. The plan shall include, but not limited to, factors such as headcount, DPR, pre-debit attrition, number of sign-up donors and number of approved donors.

Personnel Qualifications

- Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TORs;
- Describe their experience and expertise in working with similar projects / UN / International organizations;
- Provide the list of operating managers and share their career background and years of experience.
- Provide the list of core members of skilled campaigners who will be leading the team for UNHCR and share their career background and years of experience.

Vendor Registration Form: If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (Annex C).

UNHCR General Conditions of Contract for Provision of Services: Your Technical Offer should contain your acknowledgement of the UNHCR General Conditions of Contract for Provision of Services by signing **Annex D**.

Special Terms and Conditions for F2F Fundraising Activities: Your technical offer should contain your acknowledgement of the UNHCR Special Terms and Conditions for F2F Fundraising Activities by signing **Annex E**.

Please note that UNHCR provides basic template for Financial Offer Form as in Annex B for reference. Vendors can submit additional documents to supplement the proposal in the Technical offer.

2.4.2 Content of the TECHNICAL OFFER for F2F Fundraising Retention Services (LOT B)

Company Qualifications

- General Liability and Capacity
 - Company profile
 - Registration certificate
 - Year founded
 - If a multi-location company, please specify the location of the company’s headquarters and the branches with founding dates
 - 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;
- Proven track record on the number of clients for telemarketing fundraising projects currently underway and/or completed in the non-profit sector (i.e. in the charity sector)
- Any relevant experience working with UNHCR Korea, other UN Agencies and NGOs will be an asset, all information should be included;

- Detailed performance results
- Total number of clients, please provide a list and their contact information.

Proposed Services

- Quality/clarity of interpreting and presenting F2F fundraising services as described in Point 2 “Core Requirements” of TORs.
- A clear and detailed description on whether the elements under Point 2 “Core Requirements” of TORs can be executed or not with valid reasons.
- A description of current systems in place that gives a clear picture and idea of the vendor’s operating system and structure.
- The following sample is to be provided:
 - One (1) sample monthly report of performance analysis

Personnel Qualifications

- Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TORs;
- Describe their experience and expertise in working with similar projects / UN / International organizations;
- Provide the career background and years of experience of the operating manager.

Vendor Registration Form: If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (Annex C).

UNHCR General Conditions of Contract for Provision of Services: Your Technical Offer should contain your acknowledgement of the UNHCR General Conditions of Contract for Provision of Services by signing **Annex D**.

Special Data Protection Conditions: Your technical offer should contain your acknowledgement of the UNHCR Special Data Protection Conditions by signing **Annex F**.

Please note that UNHCR provides basic template for Financial Offer Form as in Annex B for reference. Vendors can submit additional documents to supplement the proposal in the Technical offer.

2.4.3 Content of the FINANCIAL OFFER

Your separate **Financial Offer** must contain an overall offer in a single currency, **South Korean Won (KRW)**.

The Financial Offer is to be submitted as per the Financial Offer Form (Annex B). The Financial Offer must cover all the services to be provided (price “all inclusive”).

The vendors shall refer to Point 6 of Annex A (TOR) when completing the Financial Offer Form (Annex B).

UNHCR is exempt from all direct taxes and customs duties. With this regard, price must be given without VAT.

You are requested to hold your offer valid for 120 days from the deadline for submission. UNHCR will make its best effort to select a company within this period.

UNHCR's standard payment terms are within 30 days after satisfactory implementation and receipt of documents in order.

The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

2.5 **BID EVALUATION:**

2.5.1 **Supplier Registration:**

The qualified supplier(s) will be added to the Vendor Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents. The investigation involves consideration of several factors such as:

- Financial standing;
- Core business;
- Track record;
- Contract capacity.

2.5.2 **Technical and Financial evaluation:**

For the award of this project, UNHCR has established evaluation criteria which govern the selection of offers received. Evaluation is made on a technical and financial basis. The percentage assigned to each component is determined in advance as follows:

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		
LOT A for F2F Recruitment Services (max 20 points)		
General Liability / Capacity of the Company.	10	The scores will be allocated based on the information on documents such as company profile, year founded, registration certificate, balance sheet and last audit reports.
Overall F2F fundraising recruitment service experience/time in business, including non-profit knowledge market.	10	The scores will be allocated for the number of years in the sector or for the number of clients in Korea or abroad, based on the evidence provided.
LOT B for F2F Retention Services (max 20 points)		
General Liability / Capacity of the Company	10	The scores will be allocated based on the information on documents such as company profile, year founded, registration certificate, balance sheet and last audit reports.
Service provision experience in the non-profit sector	10	The scores will be allocated for the number of clients in the charity sector, based on the evidence provided.
Proposed Services		
LOT A for F2F Recruitment Services (max 40 points)		
Comprehensiveness of proposal.	5	There is no set format for the technical evaluation. Please follow the structure of requirements listed under point 2 and point 4 of TORs 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.
Quality/clarity of interpreting and presenting F2F fundraising services with the requirements listed under point 2.1 of TORs	20	Comprehensive proposal presented by addressing if all element of "Core Requirements" under point 2.1 of TORs can be executed or not with valid reasons. A clear picture and idea of the internal operating system shall be able to be drawn based on the offer.
Operation plan for phase 1,2 and 3 with detailed forecast of key factors including, but not limited to, headcount, DPR, pre-debit attrition, number of sign-up donors and approved donors.	5	Comprehensive plan table that includes all or more than the factors listed under point 4.2 of TORs, and it enables to understand the growth plan over the phases.
Experience of completing similar projects (or currently in progress) internationally and/or locally.	10	The scores will be allocated for the number of experiences with UN, major or similar organization partnerships. The performance result will also be used as reference data.
LOT B for F2F Retention Services (max 35 points)		
Comprehensiveness of proposal	5	There is not set format for the technical evaluation. Please follow the structure of requirements listed under point 2 of TORs 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.
Compressive proposal presented by addressing all requirements under 2.2 of TORs	20	Comprehensive proposal presented by addressing strategies and training that will be in place to achieve the Key Deliverables suggested in 2.2 of TORs
Compliance with standard and operations management services listed under 2.2 of TORs	10	Comprehensive proposal presented by addressing Standard Requirements and Operation Managements under 2.2 of TORs
Personnel Qualifications		
LOT A for F2F Recruitment Services (max 10 points)		
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	10	The scores will be allocated based on the average years of relevant experience of the staff (both fundraisers and operating managers) assigned to the project.
LOT B for F2F Retention Services (max 15 points)		
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	15	The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.

Remark: The Technical offer score will be calculated according to the percentage distribution for the technical and financial offers.

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.

The companies that are shortlisted based on the technical proposal (by obtaining the minimum required 49 points) may be invited to meet the Technical Evaluation Committee (TEC) if further clarifications are required in their technical proposal. No new elements are to be presented nor required and no financial information can be revealed during this interview. In case an interview is required, dates will be communicated later.

The **Financial offer for F2F Recruitment Services (Annex B, LOT A)** will be evaluated using the following percentage distribution: **30%** from the total score.

The maximum number of points will be allotted to the lowest price offer (cost per donor) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., $[\text{total Price Component}] \times [\text{KRW lowest}] / [\text{KRW other}] = \text{points for other supplier's Price Component}$.

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, 12-month ROI, attrition at 3, 6 and 12 months, as well as number of fundraisers, teams, locations and cities suggested will help to assess the pertinence of the proposal.

Companies can quote only in Korean Won. The offers will be converted into US Dollars for evaluation purposes only by using the United Nations rate of exchange in effect on the date the submission is due.

The **Financial offer for F2F Retention Services (Annex B, LOT B)** will be evaluated using the following percentage distribution: **30%** from the total score.

The maximum number of points will be allotted to the lowest cost per donor for retention offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., $[\text{total Price Component}] \times [\text{KRW lowest}] / [\text{KRW other}] = \text{points for other supplier's Price Component}$.

Companies are allowed to quote only in Korean Won.

2.6 SUBMISSION OF BID:

Bids should be submitted by file upload to eTenderBox, the online bid registration tool of UNHCR. The eTenderBox can be accessed via the following URL:

<http://etenderbox.unhcr.org>

In order to use eTenderBox, registration on the website is required. This registration is exclusively for eTenderBox and does not replace any other registration with UNHCR. Please refer to **Annex G** for registration guide and **Annex E** for user manual.

A supplier should have only one registered email account in the system. The supplier must use only that eTenderBox account for managing its offers to UNHCR.

In case the password is forgotten, that account cannot be used anymore, and new registration is required. The eTenderBox Registration Guide and Use Manual are available at the above URL and provided as annexes to this RFP.

IMPORTANT:

The technical and financial offers shall be clearly separated by uploading them to the appropriate category in the system. Failure to do so may result in disqualification.

Allowed extension for files to upload are .doc, .docx, .xls, .xlsx, .rtf, .png, .jpg, .jpeg, .pdf, .txt, .zip, .ppt, .pptx, .mbp, .rar, .gif, .tif and .tiff. Executable files (.exe, .bat, .cmd, etc.) should not be uploaded. **The maximum size limit per file is 10MB.**

Uploaded files can be amended by the Supplier while the tender is open. The selected files for upload are submitted when the 'Save & Submit' button is clicked on. Therefore, this button must be clicked before the deadline expires. If done so, the selected files will be submitted and uploaded successfully even if the deadline expires during the file upload. It is the Supplier's responsibility to

ensure that all files of the final offer are submitted by the tender expiration deadline.

Once the deadline for submission is expired, the bid will be automatically closed after which the uploaded files can be reviewed but options for additional upload and deletion of previously uploaded files are not available anymore. In order to ensure the safe submission of the full and final offer, it is recommended to have all files uploaded well before the tender deadline.

DEADLINE: 6 of October 2021 23:59 GMT +9 hrs. (Korea time zone)

IMPORTANT:

Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

It is supplier's responsibility to verify that documents and correspondence have been submitted properly before the deadline.

UNHCR will not be responsible for locating or securing any information that is not identified in the bid. Accordingly, to ensure that sufficient information is available, the bidder shall furnish, as part of the bid, any descriptive material such as extracts, descriptions, and other necessary information it deems would enhance the comprehension of its offer.

2.7 BID ACCEPTANCE

UNHCR reserves the right to accept the whole or part of your bid.

UNHCR may at its discretion increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the rate submitted. Any such increase or decrease in the contract duration would be negotiated with the successful bidder as part of the finalization of the Purchase Orders for Services.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs, as well as conforming to UNHCR's general principles, including economy and efficiency and best value for money.

UNHCR may, at its discretion, award multiple contracts to several companies if the highest-ranking vendor(s) communicates a lack of capacity to provide all the required services OR if UNHCR assess that awarding multiple contracts ensures the best interest of UNHCR. The assessment involves consideration of several factors such as:

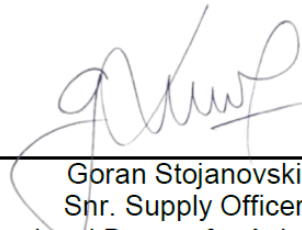
- Risk management
- Territory coverage
- Diversification of fundraising methods, locations, and/or strategies
- Quality enhancement

2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

Any Purchase Order (PO) issued as a result of this RFP will be made in the currency of the winning offer(s). Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

2.9 UNHCR GENERAL CONDITIONS

Please note that the General Conditions of Contract (**Annex D**), the Special Terms and Conditions for F2F Fundraising Activities (**Annex E**) and Special Data Protection Conditions (**Annex F**) will be strictly adhered to for the purpose of any future contract. The Bidder must confirm the acceptance of these terms and conditions in writing.



Goran Stojanovski
Snr. Supply Officer
UNHCR Regional Bureau for Asia and the Pacific