

Annex A: Terms of Reference
ROK/RFP/PSP/2021/006
FOR THE PROVISION OF
FACE TO FACE RECRUITMENT SERVICES AND
DONOR RETENTION SERVICES
IN THE REPUBLIC OF KOREA

Table of Contents

1	Introduction	3
1.1	Background	3
1.2	Statement of Purpose & Objectives.....	3
2	Core Requirements	5
2.1	LOT A for F2F fundraising recruitment services	5
2.2	LOT B for F2F fundraising retention services.....	8
3	UNHCR Responsibilities	12
4	Content of the Technical Offer	13
4.1	Company Qualifications	13
4.2	Proposed Services.....	14
4.3	Personnel Qualifications.....	14
4.4	Vendor Registration Form.....	15
4.5	Applicable General Conditions.....	15
4.6	Applicable Special Terms and Conditions for F2F Fundraising Activities	15
4.7	Applicable Special Data Protection Conditions	15
5	Technical Evaluation.....	16
6	Financial Evaluation	18
7	Key Performance Indicators	19

1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) in the Republic of Korea (ROK) 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. As part of a global UNHCR strategy of building awareness and increasing private sector funds, this has been carried out since 2009.

UNHCR expects the winner(s) of this RFP to be able to provide the service from 1 Jan 2022 onwards.

1.2 Statement of Purpose & Objectives

To achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR is seeking to enter into a Frame Agreement (FA) for F2F recruitment and retention services with vendors specialized in such service area.

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)

Vendors can submit a proposal for either LOT A F2F fundraising recruitment services or LOT B F2F fundraising retention services, or for both services. Please note that it is NOT mandatory to submit proposals to all services. The evaluation will be carried out separately on technical and financial level.

Please clearly indicate the services (LOT A, LOT B) you are bidding for in your technical proposal, paying close attention to the all general and lot-specific criteria. The financial offer form includes all lots on separate tabs, please disregard the tabs for the lot you are not bidding on.

The UNHCR expects to achieve the following targets:

LOT A: For F2F fundraising recruitment services¹:

- Minimum performance delivery requirement to participate in the RFP is twelve thousand and five hundred (12,600) new monthly giving donors per vendor for the Frame Agreement period (1 Jan 2022 until 31 Dec 2024).
- Fulfilment of the requirements for minimum performance as stated above is mandatory.

¹ Please note that these figures (ROI, min. donors and min. donation) are based on UNHCR PSP benchmarking exercise and annual plan. The minimum requirements are to be met as mandatory. Vendors are requested to prepare their bids based on their **maximum** but **realistic** capacity/availability in case it is higher than the set figures.

- Monthly pledges may be set up by direct debit.
- Minimum billable monthly gift amount is 20,000 Korean Won. (There is a possibility in future upward adjustment).
- Minimum billable age of account holder is 26 in international age.
- No cash gifts can be received by the fundraisers.
- One-off gifts accepted by fundraisers will not be chargeable.
- Duplicated donors will not be chargeable.
- 12-month ROI of 1.1 based on:
 - the required number of new monthly giving donors to acquire per year
 - the average value of a donor on monthly basis
 - an estimation of donor attrition (% of donors who stop their donations during the first 12 months, by evaluating at the 3, 6 and 12 month mark).

Our expectation is to view proposals that are designed to reach at least the minimum number or more of donors based on:

- number of fundraisers.
- number of teams.
- number of locations/venues per month.
- number of cities where the program will be run.

LOT B: For F2F fundraising retention services:

- The company tries to mobilize its capabilities to achieve the expected outcome stated below:
 - 50% contact rate for all outbound call campaigns
 - 25% conversion rate for upgrade call campaign
 - 20% conversion rate for reactivation call campaign
 - 95% response rate for incoming calls
- The company is expected to ensure deliver satisfactory quality services for any donors of UNHCR

2 Core Requirements

Vendors are requested to prepare their technical proposal based on the requirements listed below and quote for the services separately on Annex B- Financial Offer Form. Please disregard the tabs for the lot you are not bidding on.

The evaluation will be carried out separately both on technical and financial levels.

The contractors will need to deliver following:

2.1 LOT A for F2F fundraising recruitment services

Vendors are required to conduct the F2F fundraising campaigns at event, businesses (B2B), and targeted public sites to solicit regular giving donations.

Vendors will collect donations in the form of a pledge by a donor to have an amount deducted from the donor's bank account and paid into a UNHCR bank account on a regular basis as a donation to UNHCR by the donor.

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.

Operation Structure

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.

We expect:

- **The main office (operational part) to have:**
 - One (1) Chief Executive to:
 - Lead to maximize goal achievement that is mutually agreed between the Contractor(s) and UNHCR.
 - One (1) F2F Manager in charge for UNHCR to:
 - Serve as a focal point to oversee the effective implementation of the F2F program.
 - One (1) Manager in charge for complaints regarding UNHCR campaign to:
 - Investigate when the complaints on UNHCR campaign occur and actively report and communicate with UNHCR about the situation and solutions.
 - One (1) Manager in charge for calls to:
 - Make welcome calls to newly recruited donors.
 - One (1) Manager in charge for data uploads and management to:

- Make sure that donation information and scanned copy of each pledge form is successfully uploaded to UNHCR data base in a timely manner as requested by UNHCR.
- **Each branch office (fundraising part) to have:**
 - One (1) Manager per region 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 per team 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, while also participate in fundraising activity.

Operation Management

All plans and materials will be subject to sign off and approval from UNHCR.

Contractor(s) will be required to mobilize sufficient number of operation support staff to provide the services as below:

- **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 involved in the UNHCR F2F program.
- **Location Sites Arrangement**
 - Plans and applies for location sites for all F2F teams.
 - Request for approval from UNHCR for F2F operation at location sites as planned above.
 - Prepares and submits applications to obtain approval and all relevant permits from all concerned parties.
 - The Contractor(s) is primarily responsible for the payment 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.
 - Vendors must remain sensible and respectful to UNHCR and other vendors in partnership with UNHCR when engaging in coordination and arrangements.
- **Logistics Arrangement**
 - 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 program at the predefined locations; items such as banners and booths shall be self-produced by vendors upon UNHCR's approval.

- Provides identification badges for UNHCR fundraisers.
- **Management 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 be accounted for at all times.
 - Ensures that donation forms are accurately completed and signed by the donors.
 - Ensures that no information on the donor pledge is misused in any circumstances.
 - Ensures that information of each donation form is uploaded to UNHCR data base in a timely manner as requested by UNHCR.
 - Ensures that all completed or voided donation forms are returned to UNHCR once a week.

Fundraisers Management

- **Training**
 - Induction training to all newly recruited F2F program 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 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**
 - Ensure that all staff members comply and sign a code of conduct agreed by UNHCR.
 - Ensures that fundraisers for UNHCR work in a professional and sincere manner, attitude and mindset in consideration of human rights and dignity of the Persons of Concern to UNHCR that they represent as well as the genuine empathy and kind willingness of donors to join in the fundraising campaign.
 - 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 program.

Reporting

- Provides daily acquisition results. (ex: number of fundraisers, number of new donors, DPR and gift amounts)
- Provides monthly analysis reports of donor acquisition results
- Provides weekly and monthly location plans for all F2F teams.
- Provides real-time updates on UNHCR campaign locations.
- Provides both verbal and written reports of any misconduct or complaint received in regard to staff engaged in UNHCR's F2F activities as soon as the event occurs; provides written reports with explanations on actions taken to settle the complaints and both short-term and long-term solutions to prevent the recurrence of such events within three (3) working days.
- Provides mystery shopping reports to UNHCR at least on annual basis by appointing a professional "mystery shopping" company to carry out anonymous "mystery shopping" at all sites.

2.2 LOT B for F2F fundraising retention services

List of Services

The following are the services required of the contractor. Please use Annex B for your financial proposals to indicate costs for the retention services. The technical proposal cannot contain any financial details. Failure to comply with these criteria will result in disqualification.

Basically, the number of calls for each target donor is set to 3 times. On the other hand, the types of campaigns and the number of call attempts may be changed by mutual consultation to maximize the performance of the campaigns.

Campaign	Target	Key deliverables
Reactivation call	Donors with failed debits for several months	Change of bank account or Debit success in the following month of the call
Reactivation call for Cancelled Donor	Donors who cancelled the donation 7 months ago	Reactivation of cancelled donor
Upgrade call (M7)	Donors who have signed up 7 months ago	Upgrade of regular giving level at least 25% of donors contacted
Upgrade call (M13)	Donors who have signed up 13 months ago	Upgrade of regular giving level at least 25% of donors contacted
Upgrade call (M20)	Donors who have signed up 20 months ago	Upgrade of regular giving level at least 25% of donors contacted
Follow up calls on credit card error	Donors with failed credit card payment	Update of credit card information
Follow up calls on returned	Donors who did not receive comms materials due to wrong postal address	Update of postal address

communication materials		
Loyalty call	Donors who have been with UNHCR for more than 13 months after sign-up	Increase of donor retention in Y2
Renewal of Donation call	Donors who set specific donation period	Renewal of regular giving donation
Inbound call	Any incoming calls	Response rate of 95%
Bank account verification call	New donors and Donors who change the account via online	Successful change of bank account

Additional note: Volumes (Annex B. Financial Offer) indicated are our best estimates based on the knowledge we have to date and are subject to change. The schedule, number of campaigns and records provided may vary and are subject to UNHCR's confirmation. Volumes indicated may not represent the final volume of the program.

Standard Requirements for F2F Retention Services

In the Technical Offer please detail how your company can implement and satisfy the Standard Service requirements, which are as follows:

- All agents need to be fluent in Korean.
- Working hours 9:00-18:00 (Mon-Fri) on each working day based on Korean calendar.
- Agents to handle credit card and debit account number donations by using the donor management application which is provided by UNHCR as well as to record every communication history with donors.
- In conjunction with UNHCR Korea, agency to develop high quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues.
- Provision of all human relations activities related to staffing for UNHCR Korea' campaign including:
 - Planning and coordinating the recruitment of highly competent staff to effectively perform the campaigns.
 - Planning, development, and maintenance of motivation schemes as deemed appropriate.
- Provision of an Account Manager(s) to serve as a focal point to oversee the effective implementation of the F2F fundraising retention services including:
 - Reporting performance of the campaigns regularly and irregularly as deemed appropriate.
 - Provision of comprehensive training and coaching to agents to ensure the call quality and to develop the performance of program.

Operation Managements for Campaigns

Agencies are also required to include the following (if applicable) in their proposals:

- The vendor is required to present their overall strategy, campaign planning for their telemarketing services.
- The vendor is required to give access to call logs and recordings as requested to UNHCR with no additional charges. All call logs and recordings should be provided to UNHCR securely with all personal and financial information removed.
- The vendor is expected to provide quality control and to explain how quality of campaign calls is done with front-line telemarketers.
 - In addition, the vendor is also expected to describe their procedures regarding complaint management.
- The vendor is required to propose the number of trainers and front-line telemarketers for this project to train their staff and to participate at the induction training provided by UNHCR Korea. The vendor is expected to provide a detailed description of the proposed model for this project (e.g.: dedicated team, full-time or part-time, shared workload, etc.), as part of this proposal and implement it accordingly. The vendor is required to provide trainings with daily monitoring to its agents and keep their knowledge up to date.
- The vendor is expected to comply with personal information protection acts and explain in their proposal how this is handled at the agency level.
 - The vendor is required to describe their procedures in terms of these privacy laws and their compliance with UNHCR Data Privacy provisions and Korea data privacy regulations.
- The vendor is also required to perform weekly & monthly report, data analysis on its services provided, and to generate recommendations on how to improve services to increase contact rates and meeting KPIs. This includes:
 - Preparing and submitting high-level weekly reports, a monthly tracker and detailed quarterly reports of telemarketing results;
 - Providing reports to measure key performance indicators (KPIs) including but not limited to decision maker contacts, number of contacts, conversion rate, average donation, and return on investment.
 - Providing reports to analyze the performance of testing strategies, segmentation analysis and introduction of new measures;
 - Providing a verbal report of any misconduct or complaint received in regard to staff engaging in UNHCR's telemarketing activities as soon as practicable and a written report with actions taken and/or proposed remedy to UNHCR within 3 working days; and
 - Arranging quarterly face to face meetings with UNHCR

Performance of Work

The appointed vendor is responsible to provide all supervision, equipment, labour and materials necessary to complete the work as described herein. The vendor shall supervise and complete the project using its best skill and attention. The vendor shall furnish management, supervision, coordination, labour and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of this Terms of Reference.

All services rendered by the vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The vendor shall conduct all its activities in strict confidence. The vendor shall handle and respect data privacy, if applicable, in a professional manner.

Compliance with the Government Requirement

The vendor shall comply with all applicable laws, statues, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the project;

The vendor shall give all notices required of it by governmental authorities relating to the project.

Rejection and Correction of Work

During the project, the vendor shall supervise and promptly discontinue any activities which (i) does not conform to the requirement in this Terms of Reference, or (ii) does not comply with any applicable law, statue, ordinance, code, rule or regulation of any authorities and agencies having jurisdiction over the project.

UNHCR reserves the right to reject any work performed by the vendor, in whole or in part, that, at UNHCR's sole and absolute discretion, are unsatisfactory, unacceptable, undesirable, or inappropriate.

The vendor shall promptly correct or require the correction of all rejected work and shall bear all costs of correcting such work.

3 UNHCR Responsibilities

The UNHCR is responsible for providing the following:

- Design, print and deliver acquisition material (e.g. pitch cards, leaflets, donation forms, banners, uniforms, welcome packages)
- Liaise with the Contractor
- Attend regular project management calls and meetings
- Review and reconcile reports submitted by the Contractor with UNHCR database reports
- Provide the income processing platform
- Provide training sessions to fundraisers when necessary
- Provide training sessions to call agents when necessary

4 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:

4.1 *Company Qualifications*

LOT A for F2F fundraising recruitment services:

1. General Liability and Capacity
 - a. Company profile
 - b. Registration certificate
 - c. Year founded
 - d. If a multi-location company, please specify the location of the company's headquarters and the branches with founding dates
 - e. 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
2. Fundraising experience in the business or the number of similar and successfully completed projects to donor acquisition process.
3. Any relevant experience working with UNHCR Korea, other UN Agencies and NGOs will be an asset, all information should be included.
4. Detailed performance results such as average DPR and average age will also be an asset in the description of past and current experience as requested in number 2 and 3 above.
5. Total number of clients, please provide a list and their contact information.

LOT B for F2F fundraising retention services:

1. General Liability and Capacity
 - a. Company profile
 - b. Registration certificate
 - c. Year founded
 - d. If a multi-location company, please specify the location of the company's headquarters and the branches with founding dates
 - e. 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.
2. 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)
3. Any relevant experience working with UNHCR Korea, other UN Agencies and NGOs will be an asset, all information should be included.
4. Detailed performance results.
5. Total number of clients, please provide a list and their contact information.

4.2 Proposed Services

LOT A for F2F fundraising recruitment services:

1. Quality/clarity of interpreting and presenting F2F fundraising services as described in Point 2 “Core Requirements” above.
2. A clear and detailed description on whether the elements under Point 2 “Core Requirements” can be executed or not with valid reasons.
3. A description of current systems in place that gives a clear picture and idea of the vendor’s operating system and structure.
4. 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.

LOT B for F2F fundraising retention services:

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

4.3 Personnel Qualifications

LOT A for F2F fundraising recruitment services:

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

1. Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TOR;
2. Describe their experience and expertise in working with similar projects / UN / International organizations;
3. Provide the list of operating managers and share their career background and years of experience.

4. 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.

LOT B for F2F fundraising retention services:

Please indicate the composition of the team (operating manager, call agents) you propose to provide for the project. In particular:

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

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 acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

4.6 Applicable Special Terms and Conditions for F2F Fundraising Activities

LOT A for F2F fundraising recruitment services only:

Please indicate your acknowledgement of the UNHCR Special Terms and Conditions for F2F Fundraising Activities (Annex E).

4.7 Applicable Special Data Protection Conditions

LOT B for F2F fundraising retention services only:

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex F).

5 Technical Evaluation

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 number of years in business, please submit registration certificate and indicate the year founded,
Overall F2F fundraising recruitment service experience/time in business, including non-profit knowledge market.	10	The scores will be allocated for the number of clients in Korea or abroad, based on the evidence provided (in both private and charity sector in total)
LOT B for F2F Retention Services (max 20 points)		
General Liability / Capacity of the Company	10	The scores will be allocated for the number of years in business, please submit registration certificate and indicate the year founded,
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 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	20	Comprehensive proposal presented by addressing if all element of "Core Requirements" under point 2.1 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, 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.

F2F RECRUITMENT & RETENTION SERVICES FOR THE REPUBLIC OF KOREA

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 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	20	Comprehensive proposal presented by addressing strategies and training that will be in place to achieve the Key Deliverables suggested in 2.2
Compliance with standard and operations management services listed under 2.2	10	Comprehensive proposal presented by addressing Standard Requirements and Operation Managements under 2.2
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.

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.

Please refer to Point 4 for technical proposal.

6 Financial Evaluation

LOT A for F2F fundraising recruitment services:

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. No other format will be accepted. The technical proposal cannot contain any fees or pricing information. Failure to comply with this requirement will result in disqualification. The financial comparison and ranking will be based on cost per acquisition (CPA).

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.

Please make sure to fill in sheet number LOT A 3 “clawback” if there is any. 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. For instance, 7-month clawback system would monitor each regular donor’s payment status for additional 6 months since the first-time payment has been completed. Then, the refund will be made according to the number of incomplete payments within those periods.

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.

LOT B for F2F fundraising retention services:

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.

7 Key Performance Indicators

LOT A for F2F fundraising recruitment services:

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

- Number of donors per month
- Average gift amount
- Average age of donors (bank account holders)
- Pre-debit attrition rates (Before 1st debit)
- Attrition rates (after 1st debit)
- ROI
- Cost per donor

LOT B for F2F fundraising retention services:

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

- Conversion rate of Upgrade Call
- Conversion rate of Reactivation Call
- Average pledge amount of Upgrade Call
- Average pledge amount of Reactivation Call
- Contact rate of all calls