

TERMS OF REFERENCE FOR INSTITUTIONAL CONTRACTS



Requesting Section: Private Fundraising and Partnerships- Regional Support Center

Terms of Reference for Face-to-Face Fundraising Service – Donor Recruitment

1. Background

UNICEF country offices in Latin America and Caribbean region started pledge donor (regular giving donor) recruitment through Face-to-Face fundraising and it has become an essential fundraising technique in Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Mexico, Peru and Uruguay, while Costa Rica, Dominican Republic, Guatemala, Panama, and Paraguay have started to analyze their market for testings and openings. The activity is in line with UNICEF Private Fundraising and Partnerships (PFP) Global Strategy, i.e. focusing on building a sustainable pool of regular donors and providing valuable unrestricted income for Country Offices (CO) and, increasingly as CO income grows, also contributing to the Regional Thematic Fund and Global UNICEF Programs. UNICEF wishes to continue pursuing the recruitment of high-quality donors via Face-to-Face fundraising activity across all territories in Latin America and Caribbean region.

2. Objectives, Purpose & Expected results

UNICEF is seeking to establish non-exclusive Long-Term Arrangements (LTAs) for Face-to-Face Fundraising service with an initial duration of 3 years (36 months) plus the option to extend the arrangement for 2 years (24 months) subject to satisfactory performance and agreement of both contracting parties. UNICEF will provide expertise in the field of maximising value from donors recruited, and our expectation for donor recruitment is that our appointed contractor(s) will focus on the recruitment of significant volume of high-quality donors.

The current territory for service is Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Mexico, Peru and Uruguay and UNICEF may expand this fundraising activity in the mentioned emerging markets being Costa Rica, Dominican Republic, Guatemala, Panama, and Paraguay **If the bidder is already active in any other LACRO country not listed above and plans to establish the business in additional countries, kindly include this information in the technical proposal.**

Kindly note:

- Bidders may submit their proposals for a single, several or all countries listed above.
- Each technical and financial proposal must state clearly define the country to which the technical and financial plan refers.
- Bidders may be awarded the work assignment in a single or several countries based on their proposals and respective evaluation.
- If the bidder has legally separate entities in different countries, the technical proposal must outline the overall organisational structure. The proposal must clearly reference the legal entity, which would be the contracting and invoicing party in each of the countries.

Each legal entity which would act as the contracting party must fill in and sign the bid form.

3. Description of the assignment

I. Donor acquisition

- a) Conduct the face-to-face fundraising campaigns at events, businesses, in residential locations (i.e. door-to-door), streets, trucks and targeted public sites in defined territories as agreed with UNICEF, to solicit regular **monthly** giving donations. *Soliciting regular monthly donations means collecting donation forms that allow a donation to be deducted monthly from the donor's credit card or bank account and paid to UNICEF on a fixed schedule.*
- b) The contractor must display an understanding of the market and seek to actively test various acquisition strategies that are approved by UNICEF to attain the best pledge long-term value and portfolio diversity for UNICEF's investment. For example;
 - i. Age limits
 - ii. Minimum gift amount
 - iii. Payment methods
 - iv. Testing new sub-channels outside of event bookings
 - v. Testing new markets
- c) Produce and/or administrate the use of fundraising marketing materials as follows, but not limited to: tablets, donation forms, branding materials, pitch materials, uniforms and other materials to use at sites with proper management of inventories. The contractor must obtain prior written approval from UNICEF for all materials production. The contractor shall indicate in the proposal the plan to produce any materials, i.e. Field representative' badges and specify whether this generates any extra cost. This will be agreed with each UNICEF office in the contract.

UNICEF maintains the sole right on the intellectual property of our fundraising materials, tools and design which are co-created and co-developed with the contractor, and reserves the right to utilise these materials, tools and design for other UNICEF fundraising activities which may directly or indirectly relate to the scope of face to face fundraising activities described in this term of reference. The contractor must not extend the use of materials design or ideas co-created together with UNICEF to other National or International NGOs for their fundraising activities.

- d) Manage the workforce to work in agreed locations to carry on the fundraising campaign.
- e) Based on the overall UNICEF fundraising growth strategy and related fundraising targets, the contractor will be working non-exclusive in various markets alongside UNICEF in-house teams and other contractors.
- f) Take all reasonable steps to recruit the volume of new pledge donors at the specified donation levels as agreed with UNICEF.
- g) Take all reasonable steps to ensure that the donors complete and sign/confirm the online donor forms with all the necessary and accurate information (as agreed by UNICEF).
- h) Ensure that all donors recruited are aware of, and agree to, the long-term nature of the commitment to provide ongoing financial support for UNICEF.

II. Field Representatives recruitment, Training and Quality assurance

- a) Meticulously recruit, train and retain Field Representatives to be ready to execute the face-to-face fundraising campaign. The contractor must have a dedicated, locally-based leadership and must ensure a minimum volume of field representatives to recruit the required quantity of donors.
- b) Undertake measures to ensure that neither they nor their representatives solicit, procure or accept cash donations or any other donations except according to a properly completed Donor Form (unless mutually agreed between UNICEF and the contractor.)
- c) The contractor will ensure that quality assurance procedures are in place to minimise the risk of fraudulent and other improper behaviours by the Field Representatives, and is primarily required to:
 - i. Put in place a due diligence/screening process at the point of recruitment and during the Field Representative's assignment period to ensure the Field Representatives are at no possible reputational risks.
 - ii. Ensure its employment contract with the Field Representatives comply with local and international employment laws (this also applies to its sub-contractors).
 - iii. Understand that UNICEF subscribes to the Convention on the Rights of the Child, and that the contractor shall not be involved in contracting or employing its Field Representatives who are below the minimum age of employment according to local and international laws.
 - iv. Ensure that no Field Representative engages in any misleading or deceptive conduct.
 - v. Ensure that apart from completing the Donor Forms, no Field Representative accepts any form of donations including, but not limited to, cash and gifts.
 - vi. Ensure that no Field Representative commits any act which may compromise the image and interests of UNICEF.
 - vii. Ensure that all Field Representatives comply with applicable laws and regulations while carrying out activities with UNICEF's Face-to-face fundraising campaigns.
 - viii. Take necessary disciplinary actions against the Field Representative for any inappropriate behaviour which could compromise the public image of UNICEF.
 - ix. Make reasonable efforts to correct or mitigate the negative outcome of inappropriate behaviour, including but not limited to fraud, of its current or former Field Representative(s).
- i) Conduct professional Third Party (Independent) "Mystery Shopping" to carry out spot-checks and anonymous mystery shopping activities at Face-to-face sites regularly, to ensure qualitative performance and proper behaviour of the Field Representatives and to provide quarterly mystery shopping reports to UNICEF. The contractor must ensure that the 'mystery shopping' or quality check is an explicit and accepted term for the field representatives. A quarterly mystery shopping report, at minimum, must be submitted to UNICEF to ensure the quality performance and behaviour of the Field Representatives. Specify whether this generates any extra cost. This activity and its conditions will be agreed with each UNICEF office in the contract.

Mystery shopping is the process of 'spot checking' by unidentified individuals who 'act' as a member of the public. They go through the process of engaging with the Field Representative on the street or at an event site (without the field representative knowing) in order to quality check that all is in order with messaging, behaviour and manner, etc. Field representatives are to be made aware of this process during their training and onboarding.

- d) The contractor must inform its fundraising locations during regular work shifts as accurately as possible, so UNICEF can easily view where every individual fundraiser is located at any time. Accurate location reporting is required to ensure fundraising teams can be visited in

the field without prior notice to the contractor, which is essential for the mystery shopping facet of UNICEF's quality control procedures.

UNICEF's mystery shopping includes:

- i. F2F support interviews (performed by a senior-level internal UNICEF fundraising management employee or a UNICEF Quality Control Officer)*
- ii. Mystery shopping (done either by a UNICEF Quality Control Officer or an external company contracted to UNICEF)*

Furthermore, UNICEF must be alerted immediately each time there is a location change of the fundraising team site during the fundraising day to facilitate any mystery shopping that may occur. UNICEF's quality control methodologies are entirely dependent on accurate and contemporary location reporting by the Institution.

- e) Deal with complaints and report to UNICEF in writing on the action taken within one (1) working day, in case of any complaints made to UNICEF concerning the Marketing Campaign. The contractor must ensure the fundraising activities are carried out at best donor experience. The contractor is expected to handle or conduct any possible public relations activities, mainly on social media, to create a positive impression for face to face fundraising for UNICEF.

Keep a register and prepare reports of the details of complaints including, but not limited to, complainants, complaints, any action taken as a result of the complaint; and the outcome of such action.

III. Territory, Event site and Location Management

- a) Secure and prepare event locations pre-approved by UNICEF, and when necessary set up booths to implement fundraising campaigns. Event locations also includes the arrangement of F2F road trips, and any other event fundraising campaigns setup.
- b) UNICEF requires strategic alignment with the contractor on event bookings and other fundraising locations. Strategic alignment is necessary especially where the contractor may be working with other International NGOs directly or indirectly related to children e.g. Save the Children, SOS Children's Village, World Vision, Plan International, Christian Children's Fund (including their national affiliates), UNHCR, MSF in the servicing countries it is proposing for (i.e. Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Mexico, Peru, Uruguay and emerging markets i.e Costa Rica, Dominican Republic, Guatemala, Panama, and Paraguay).

Concerning event strategy, bookings, and management, UNICEF requires:

- i. A shared national logistics strategy that ensures all territory is managed professionally preventing conflicts that adversely affect the relationship with the event site partners and the recruitment of potential donors.
- ii. That the contractor's location management focal point work in partnership with the UNICEF internal logistics team, so all event booking strategies are aligned.
- iii. That the UNICEF brand is not used for developing relationships that are intended to include the contractor's other clients.
- iv. That UNICEF remains the primary relationship manager if the UNICEF brand has been used to start the relationship.
- v. That other NGOs cannot be put (by the contractor) to fundraise in locations UNICEF has secured without our prior timely approval.

- vi. Full transparency as to the exact locations the contractor is working or planning to work.
- vii. A quarterly proposal for events booking that UNICEF can approve and work with the contractor as a partner to facilitate the events strategy.
- viii. That all bookings take place with UNICEF authorisation at least 2 weeks in advance.
- ix. A monthly or bi-monthly logistics strategy meeting that is separate from the usual reporting and communication strategy.
- x. That the contractor or partners do not use the UNICEF brand to secure high-level meetings with large corporations or to secure event space without our approval.
- xi. That the contractor maintains its compliant status to access premium UNICEF event sites.

IV. Back-end operations, Data management and reporting

- a) Process and submit the completed pledge data entry of donor forms to UNICEF or a third-party contractor(s) as specified by UNICEF **within 12-24 hours of acquisition** (except for pledge acquired on Friday, Saturday and Sunday, which must be exported and sent to UNICEF by 10 am Monday), **for the donation processing and the appointed welcome and verification calling**. This will be agreed with each UNICEF office in the contract. Specify if there is any other back office issue that should be considered and mention costs, if applicable. All new pledge donors will be contacted by a third party or UNICEF in-house team to establish their satisfaction in the acquisition and also to discuss their acquisition experience. Results of this will be provided as feedback to the contractor.
- b) Keep record and share the digital signed donor forms to UNICEF or the Database Maintenance unit (to be specified by UNICEF).
- c) Prepare sales report and analysis and submit to UNICEF on a daily, weekly and monthly basis (as locally agreed by UNICEF Office.)
- d) Ensure that any donor database system used complies with the regulations of the Payment Cards Industry Data Security Standard (PCI) and in compliance with existing local laws and regulations relating to data privacy and security. The contractor must ensure that, if they use a third party's platform, it should be PCI compliant and in compliance with existing local laws and regulations relating to data privacy and security as well.
- e) The contractor including its sub-contractor(s) if any must ensure its reporting or exporting system is compatible with UNICEF system, and provide the quick turn-around adjustments for compatibility in case UNICEF or the contractor adopts any new system.

V. Strategic Analysis and New solutions

- a) Be available for regular weekly or monthly progress meetings (by phone, online or in-person) with UNICEF staff in each country to discuss ongoing performance and plans for any remedial action in situations where this is necessary.
- b) Employ a senior competent account manager to work with UNICEF. UNICEF requires an individual with a strong business acumen to be based in each specific country of service and be responsive to UNICEF's needs and can deliver on agreed actions with UNICEF on a timely basis throughout the length of the agreement.
- c) Must clearly indicate the transition plan to **digital pledge acquisition**, if not already available. The contractor must ensure the digital pledge acquisition service to be operational the latest within 6 months from the date of the contract to secure:

- i. Data protection
- ii. Privacy
- iii. A best practice donor journey

If the contractor fails to deliver on the digital acquisition transition within the maximum timeframe of 6 months, all acquisition invoices will be subjected to a **10%** discount until the digital pledge acquisition transition is successful. Or UNICEF can decide to cancel or terminate contractual relationship with the vendor.

- d) Related to point V (c) above, the contractor will be responsible for the provision of necessary equipment or devices required for the digital pledge acquisition service.
- e) The contractor must keep updated of new solutions that could be beneficial for F2F fundraising, e.g. Virtual Reality technology, new mobile wallet payment system, and propose an action plan to make use of a potential new solution for fundraising benefits.

VI. Important Notes (applicable to all paragraphs above):

1. UNICEF reserves the right to adjust the scope of work assignments as deemed appropriate.
2. During the assignment, the contractor must inform UNICEF as soon as it foresees 5% variance in the number of recruited donor achievement against the agreed target.
3. The contractor must comply with UNICEF's special technical requirements as follows:
 - a) The minimal age of recruited donors should be 25 years old. Unicef expects a delivery of, at least, 80 (eighty) per cent of donors over 30 years old. If the number goes below (80) per cent, it must be mutually agreed upon. UNICEF will not cover the recruitment cost of this donor segment beyond the agreed threshold. This conditions can be negotiation with each Country Office.
 - b) The percentage of **one-off donors is to be capped at 5% of total donors** recruited in each month. The contractor cannot charge the fee for any one-time donations.
 - c) Satisfactory completion and accuracy of data input of Donor Forms, with a maximum 5% of incomplete and incorrect donor data submission versus total submission. If the number goes above five per cent, the contractor will not charge the fee for those donors.
 - d) **The payment method mix** (e.g. credit card, debit card, direct debit) must be within a target agreed with each UNICEF office in the contract. The contractor must provide a monthly report which includes the donor payment mix results to UNICEF and immediately put necessary measures to maintain the payment mix target agreed.
4. At least one annual face-to-face performance review must take place between UNICEF and the contractor for any potential scale-up beyond the target plan. The minimum numbers of donors to be recruited per year will be reviewed and agreed annually.
5. Sub-contracting to a third party is permissible for this assignment, provided that the third-party sub-contractor complies to the terms and conditions of the agreement, and that the contractor clarifies in the bidding proposal or informs UNICEF at least one month in advance.
6. The contractor and its subcontractors (if any) must take careful note of the UNICEF F2F Code of Conduct to align, apply and comply with the principles (see Annex E):
 - The UNICEF F2F Global Code of Conduct applies to all UNICEF affiliates conducting face to face fundraising activities (this includes face to face fundraising conducted door to door, business to business, on the street, at events, privately or through petitioning or two-step activity). Alignment will be required to these principles.

- Every Field Representative (face-to-face fundraiser) working on behalf of UNICEF must sign a copy of the code of conduct before they commence fundraising, even if they are employed or contracted to fundraise on behalf of UNICEF and do not work for UNICEF directly.
 - The UNICEF F2F Global Code of Conduct must always be adhered to by all Field Representatives (face to face fundraisers) who must not in any way denigrate the objectives of UNICEF or behave in any way that might bring UNICEF into disrepute.
7. UNICEF often works to raise funds during emergency situations. As such, the contractor is required to be flexible in responding to UNICEF's emergency campaign within 24 hours of an emergency being launched. UNICEF will notify the contractor at a country level of all emergency situations.

4. Deliverables and Performance Indicators

Satisfactory completion of work assignments, including:

- a) The number of new quality donor recruited and average monthly donation value.
- b) Quality reporting submitted to UNICEF, including weekly and monthly sales report, site and event plan and reports, complaints report, quarterly mystery shopping report.
- c) At least monthly review meetings via skype, call or face-to-face (as applicable) between the contractor and UNICEF to discuss fundraising performance, challenges and improvement solutions to maximise the service performance. These meetings are the opportunity whereby the contractor is expected to provide more in-depth results analysis and strategic solutions; and discuss challenges and measures with UNICEF.

5. Reporting requirements

Quality reporting includes, but not limited to:

- a) Sales report (weekly and monthly as agreed with UNICEF);
- b) Monthly performance report including analysis of donor recruitment performance (i.e. the number of new donors, fulfilment, donor age, fundraising locations, donor attritions);
- c) Site and event planning and reports;
- d) Complaints report;
- e) Quarterly mystery shopping report.

6. Location and Duration

The non-exclusive Long-Term Arrangements (LTAs) for Face-to-Face Fundraising Services will have an initial duration of 3 years (36 months) plus the option to extend the arrangement for 2 years (24 months) subject to satisfactory performance and agreement of both contracting parties.

- **Preparation Phase** (such as implementation plan, material development, staff training, and system set up): maximum 4 weeks after the contract start date.
- **Implementation Phase**: following the preparation phase and up to 36 months.

The contractor's office shall organise fundraising activities within the country of assignment including in provincial areas and road-trips, sub-office(s) or sub-contractor(s) at their own cost.

7. Qualification requirements or specialized skills/experience Required:

Fundamental and mandatory requirements:

- a) Bidders must have the **legal permission** to operate or **have a license** (if required by national law) to perform the necessary work assignments in each country/territory of service once contract is awarded.
- b) Bidders are be responsible for all the legal issues related to hiring and administration of their personell. UNICEF is exempt of any responsibility.
- c) Bidders must **adhere to international standard** in a) security of financial information of donors and b) data protection. Attach PCI Attestation of compliance.
- d) Bidders must have a **proven track record (minimum 2 years)** in Face to Face Fundraising or Direct Sales Marketing.
- e) Bidder's assigned account manager to UNICEF must be able to communicate fluently in spoken and written in local language. Local operations team needs to be able to communicate fluently in spoken and written in local language in order to communicate and deliver messages clearly with the Field Representatives (facers) and any other local counterparts.
- f) Bidders must declare or notify UNICEF in the technical proposal any current or future plan to undertake a similar Marketing assignment to recruit monthly or modal donors for International NGOs directly or indirectly related to children (e.g. Save the Children, SOS Children's Village, World Vision, Plan International, Christian Children's Fund including their national affiliates, UNHCR, MSF or similar) in any of the countries included in the proposal.
- g) Bidder must review the UNICEF General Terms and Conditions carefully as per Annex A to this LRPS. Kindly note, that any changes to UNICEF GTCs are only possible or permitted in very exceptional cases; and require a detailed and lengthy legal process. **We, therefore, ask the bidder to clearly highlight any comments or concerns they might have regarding the GTCs in their technical proposal. Otherwise, UNICEF understands that as per the signed bid form, the GTCs have been accepted as part of the submission to this LRPS and thus will not be a point of discussion at a later stage.**

Special and technical requirements for bidder's proposal:

- a) Bidder's proposal must indicate its **minimum and best-case** donor target, average monthly donation amount, and head-count (number of Field Representatives) projection for each of the contract period and each of the country they are bidding for.
- b) The proposal should show a rationale and plan on how the contractor aims to achieve its targets by including where possible:
 - a. Number of working days (also with foreseen factors such as festive seasons, weather, and other exceptional situation/condition e.g. Elections etc.);
 - b. Channels mix;
 - c. Indication on venues or events;
 - d. Payment methods mix, i.e. credit card and debit card/auto debit;
 - e. Sample of creative ideas for donor recruitment activities;
 - f. Business contingency plan.
- c) Bidder is advised to take note of the required assignment details and deliverables to ensure they have included all elements in their bidding proposals.

- d) Bidder's **financial proposal** must cover **all range of activities** as per the technical proposal, **including but not limited to the event fee, the event setup costs, the transportation costs, the road trip expenses, etc.**
- e) Bidder should describe clearly **the price point/fee for donor recruitment**, including its **compensation or clawback scheme** for donor attrition and if any, in its financial proposal.

Claw Back is a term used to describe when an agreed donation from a single donor is not met/collected within 30 days of the agreed period of monthly direct debit, where UNICEF has been invoiced for the failed pledge a fee shall be returned/refunded to UNICEF as a certain percentage of the total commission fee.

UNICEF favourably welcomes a clawback scheme of 6 months and more, including the different price points for lower-performing donor segments, i.e. donors using a debit card, donors using bank account direct debit method, new donor segment test, etc.

8. Evaluation process and methods

The evaluation panel will first review each response for compliance with the requirements of this RFPS. Failure to comply with any of the terms and conditions contained in this RFPS, including the provision of all required information, may result in a response or proposal being disqualified from further consideration. Kindly also refer to the detailed instructions in the main LRPS document.

Each valid proposal will be assessed by an evaluation panel first on its technical merits and subsequently on its price. For this RFPS, the weight allocated to the technical proposal is 70% (i.e. 70 out of 100 points). To be further considered for the financial evaluation, a minimum score of **45** points is required. Only proposals with a score of 45 or more points in the technical evaluation will be financially evaluated (i.e. the financial proposal will be opened). For further details and the distribution of points kindly refer to **Table 1 below**.

The weight allocated to the financial proposal is 30% as per the following: the maximum number of 30 points will be allotted to the lowest priced, technically compliant proposal. All other financial proposals will receive points in inverse proportion to the lowest price. Commercial proposals should be submitted on an all-inclusive basis for providing the contracted deliverables as described in the TOR.

The proposal(s) obtaining the overall highest score after adding the scores for the technical and financial proposals is the proposal that offers best value for money and will be recommended for award of the contract.

Table 1: Evaluation Criteria and distribution of points

TECHNICAL PROPOSAL (70 points) – as per Annex C	Max. Points
1. ORGANISATIONAL EXPERIENCE AND CAPACITY	20
a) Number of years the bidder's company has been established. Minimum 2 years. (2 points)	
b) Years of experience in carrying out activities as required in the TOR. Minimum 2 years. (3 points)	
c) Work experience in the identified countries in the region. Experience in at least 1 market in the Region. (2 points)	

<p>d) Experience in conducting similar projects either with the UN and/or other international organisations and recognition of the importance of safeguarding its brand. Experience with at least 2 UN or international organisations. (3 points)</p> <p>e) Demonstrated experience with a proven record in recruiting long term donors. (4 points)</p> <p>f) Documented due diligence/screening process to ensure the recruitment of fundraisers with no reputational risk. Ensure to add process. (3 points)</p> <p>g) Locally based team leader/account manager (i.e. Profiles, resumes, and experience of leaders and members for each applicable country). (3 points)</p>	
<p>2. TECHNICAL ABILITY, IMPLEMENTATION PLAN AND METHODOLOGY</p> <p>Overall Fundraising Plan Proposal (8 points)</p> <p>a) A detailed description of the proposed Face-to-Face Fundraising plan, including</p> <ul style="list-style-type: none"> • Number of Donors target by year for each of the country the bidding is for • Description of donors' average monthly giving amount including also the envisaged donor's payment method mix • Methodology describing the approach that will be taken to deliver the outputs • Envisaged working modalities including also which stakeholders are sought to be involved and how stakeholder involvement will be secured (the methodology shall be per the Terms of Reference). <p>Recruitment, Training and Quality Control (8 points)</p> <p>b) Proposal of Face to Face Fundraising plan to achieve the proposed targets including the number of Field Representatives (Facers), number of working days, operations and training plan of facers. The proposal should include a timeline, workflow, operational, the technical system set up.</p> <p>c) Bidder's proposal on "Mystery shopping" plan to carry out spot checks and anonymous mystery shopping activities at all sites to ensure qualitative performance and proper behaviour of the Field Representatives (Fundraisers)</p> <p>Territory management, Event sites and Location (8 points)</p> <p>d) Proposal of Face to Face Fundraising plan to achieve the proposed targets regarding territory management, venues, event locations and the number of road trips planned in each year.</p> <p>Techniques and collaterals (8 points)</p> <p>e) Proposal of Face to Face Fundraising techniques/approaches and supporting materials with proposed management of inventory (donor forms, branding materials, pitch materials, uniform and other materials to use at sites) which could best deliver donor good experience at the point of acquisition. Evidence of the Bidder's past experiences or examples.</p> <p>f) Proposal of Face to Face Fundraising techniques/approaches to ensure quality performance and behaviours of Field Representatives for an excellent donor experience and ensuring good public images of UNICEF and the contractor</p>	<p>50</p>

<p>itself including good general public impression towards face to face fundraising activities.</p> <p>Payment, Back-end Operations and Reporting (8 points)</p> <ul style="list-style-type: none"> g) Proposal showing methods of housing and maintenance of database with security measures of the database and the personal and financial data of UNICEF donors being compliant with PCI regulations, with existing local laws and regulations relating to data privacy and security. Attach PCI Attestation of compliance. h) Proposal of donor's payment options and recommendation for processing monthly donation. i) Quality of reports in Spanish (or local language) <p>Long Term Value (8 points)</p> <ul style="list-style-type: none"> j) Proposal ensuring that donors recruited are aware of the long-term nature of the commitment to provide ongoing financial support for UNICEF. Proposal should demonstrate, where possible and within reasonable scope of their work, what constitutes a good quality donor (for further healthy donor retention) and how their business plan will enable UNICEF to recruit quality donors to achieve the high level of ROI. k) Proposal showing an understanding of market-specific donor retention rates, including the implication of payment type variations and providing an estimated retention rate for the first 12 months of newly recruited donors. <p>New solutions/Innovation (2 points)</p> <ul style="list-style-type: none"> l) Proposal of new solutions, i.e. Digital acquisition platform, new payment technology, to recruit donors and process payments. <p>Evaluation on this criterias will be made by Face to Face and Individual Giving Specialists.</p>	
<p>TOTAL POINTS FOR TECHNICAL PROPOSAL (min. passing score = 45 points)</p>	<p>70</p>
<p>3. FINANCIAL PROPOSAL (30 points) – as per Annex D</p> <ul style="list-style-type: none"> • Full marks are allocated to the lowest priced proposal. The financial scores of the other proposals will be in inverse proportion to the lowest price. • All prices/rates quoted must be exclusive of all taxes as UNICEF is a tax-exempt organisation. <p>Proposal should be sent in local currency</p>	<p>30</p>
<p>TOTAL POINTS</p>	<p>100</p>

* In regards to the recruitment fee, bidder should note that UNICEF ~~is~~ prefers working on a pay per donor model, and therefore will pay for the recruited and fulfilled donors fee. Open for other propositions for implementations in new markets. Proposals should be made in local currency.

9. Administrative issues

- Bidder is requested to provide a detailed cost proposal as outlined in **Annex D** – Financial proposal response form.
- Bidder is requested to provide an all-inclusive cost in the financial proposal. The bidder is reminded to factor in all cost implications for the required service/assignment.
- Bidder should note the following terms and conditions to be stipulated in the resulting contract:

- UNICEF reserves the right to terminate the Contract if the following conditions are not met by the contractor (Related clauses on any charge value and penalty charge calculation method will be negotiated with the contractor before issuing the contracts):
- The contractor must achieve the minimum number of new donors, minimum average donation value, and not recruit new donors aged under 25 years old, maximum percentage of number of one-off donors, and attrition rates (where applicable for each related assignment) as agreed with UNICEF office, and take all measures to ensure 100% accuracy and timely submission of data input of the Donor Forms.
- The contractor hereby irrevocably assigns to UNICEF all rights, title and interest in and to all work products and documentation produced pursuant to UNICEF's requests for services hereunder including, without limitation, all applicable Intellectual Property Rights thereto.
- All information is confidential, and the contractor must not disclose or divulge any donor details to a third party.
- The contractor will acquire no legal or beneficial title or ownership in Donor Details.
- The contractor will not use the database for any other purpose other than stated in the TOR.
- The contractor must return or destroy all confidential information (including all copies of any material representing such confidential information) to UNICEF immediately upon demand or upon the termination of the contract.
- The contractor will copy and back up the data system on a daily basis.
- The contractor must adhere to international standard in a) security of financial information of donors and b) data protection.
- UNICEF reserves the right to terminate the contract anytime by issuing a formal letter two (2) months in advance to the contractor.

10. Estimated Cost of Contract

The nature of this Face-to-Face fundraising service is such that a management fee is charged as a percentage of the first annual donor income value. Therefore, no UNICEF budget needs to be planned or reserved before delivery of services (acquisition and fulfilled pledge donors).

In case there would be additional payment needed for a larger volume of donors than planned, COs will seek funding support from PFP's investment fund.

11. Chargeable Budget Code for the activity

The funding will be covered by each country office (i.e. Argentina, Bolivia, Brazil, Chile, Ecuador, Colombia, Mexico, Peru, Uruguay, Costa Rica, Dominican Republic, Guatemala, Panama, and Paraguay). Suggest to send proposal on currency specific to the market.


12. Payment Terms

Payment shall be made in 30 days upon receipt and verification of the contractor's invoice. Bidder is requested to propose any other payment arrangement if differs.

13. Contract Supervisor

Karla Cordero, Fundraising Specialist, UNICEF LACRO

14. Signatures

TOR prepared by:	Reviewed by:	Certified by:	Approved by:
Karla Cordero Fundraising Specialist, UNICEF LACRO 			
Date: 15/09/2021	Date:	Date:	Date: