

LRPS-2021

Technical Response Form (F2F Fundraising campaign)

Kindly remember to fill in and sign the mandatory **Bid Form** along with this response sheet (LRPS page 3).

NB. Contractors may submit their proposals and bids for the work assignments in a single or multiple country. Technical and Financial proposal must state clearly the country/countries they are submitting proposals for.

NB. Responses can be provided in this document under each point as free text, or through attachments as applicable. **If you wish to submit attachments to this form, the Annexes must be clearly named, and refer to such attachments clearly in your responses below.**

Part I. Fundamental and mandatory requirements

Please check Yes or No

Fundamental and Mandatory Requirements	Yes	No
<ul style="list-style-type: none">if you have the legal permission to operate or have a license (if required by national law) to perform the required work assignments in each country/territory of service once contract is awarded. *in case you are expanding your business for countries which you don't yet have legal representation as of now, please outline your strategy to acquire legal permission below*.		
<ul style="list-style-type: none">if you have experiences working in similar projects with UN and/or other international or national organizations.		
<ul style="list-style-type: none">if you have work experiences working in the identified countries of service which you are bidding for.		
<ul style="list-style-type: none">if you plan to have a Country Account Manager who communicates well in written and spoken Spanish or any other local language to be based in each country of service you are bidding for.		
<ul style="list-style-type: none">if your database management program or related tools are PCI compliant and adhere to international standard in a) security of financial information of donors and b) data protection. Please attach certificate or evidence or proof of PCI compliance.		
<ul style="list-style-type: none">if you have carefully reviewed UNICEF General Terms and Conditions attached and must clarify in its proposal in details any areas with which they cannot fully comply**.		

*** Please outline your strategy to acquire legal permission here**

Response:

****Please indicate any specific item in UNICEF's General Terms and Conditions which you cannot fully comply and would like to suggest otherwise. If so, please explain.**

Response:

Part II: Country of service and leading entity:

1. My organisation is bidding for F2F Fundraising service in the following countries:

- ☐ Argentina
- ☐ Brasil
- ☐ Chile
- ☐ Colombia
- ☐ Ecuador
- ☐ Mexico
- ☐ Peru
- ☐ Uruguay
- ☐ Costa Rica
- ☐ Dominican Republic
- ☐ Guatemala
- ☐ Panama
- ☐ Paraguay

2. In case you are applying for bidding service in more than one country, please identify your lead office which will be a focal contact partner with UNICEF and also your local office(s) which is/are expected to be involved in a contract with each UNICEF local country office.

Lead contact office name and contact details:

Local office(s) name and contact details:

3. In addition to the country listed above, please indicate if you are already conducting or plan to conduct similar scope of service in any other country in Latin American. This information would be useful in case UNICEF expands the fundraising campaign in other new countries in the region.

Response:

Part III: Organization overview and technicality:

In case you are submitting proposal for multiple countries, you must indicate if the proposal is applicable for all countries and highlight any specifics and differences per country under each respective question. In case proposals differ significantly between countries, please submit a separate proposal per country.

TECHNICAL PROPOSAL

1. ORGANISATIONAL EXPERIENCE AND CAPACITY

- a) Number of years the bidder's company has been established (2 points)
Response
- b) Years of experience in carrying out activities as required in the TOR (3 points)
Response
- c) Work experience in the identified countries in the region (2 points)
Response
- d) Experience in conducting similar projects either with the UN and/or other international organisations and recognition of the importance of safeguarding its brand (3 points)
Response
- e) Demonstrated experience with a proven record in recruiting long term donors. (4 points)
Response
- f) Documented due diligence/screening process to ensure the recruitment of fundraisers with no reputational risk (3 points)
Response
- g) Locally based team leader/account manager (i.e. Profiles, resumes, and experience of leaders and members for each applicable country) (3 points)
Response

2. TECHNICAL ABILITY, IMPLEMENTATION PLAN AND METHODOLOGY

Overall Fundraising Plan Proposal (8 points)

- a) A detailed description of the proposed Face-to-Face Fundraising plan, including
 - Number of Donors target by year for each of the country the bidding is for
Response
 - Description of donors' average monthly giving amount including also the envisaged donor's payment method mix
Response
 - Methodology describing the approach that will be taken to deliver the outputs
Response
 - 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).
Response

Recruitment, Training and Quality Control (8 points)

- 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.

Response

- 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)

Response

Territory management, Event sites and Location (8 points)

- 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.

Response

Techniques and collaterals (8 points)

- 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.

Response

- 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 itself including good general public impression towards face to face fundraising activities.

Response

Payment, Back-end Operations and Reporting (8 points)

- 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.

Response

- h) Proposal of donor's payment options and recommendation for processing monthly donation.

Response

- i) Quality of reports in Spanish (or local language)

Response

Long Term Value (8 points)

- 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.

Response

- 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.

Response

New solutions/Innovation (2 points)

- l) Proposal of new solutions, i.e. Digital acquisition platform, new payment technology, to recruit donors and process payments.

Response

3. FINANCIAL PROPOSAL (30 points) – as per Annex D

- 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.

Bidder's Experience and Expertise

Using the format below, please provide information on each assignment for which your company, and each associate for this assignment, was legally contracted either individually as a corporate entity or as one of the major companies within an association, for carrying out consulting services similar to the ones requested under this assignment.

Experience

Please provide a list of sample project undertaken during the last 3 years (a minimum of 3-5 assignments, insert as applicable). Overall experience of the bidder in the **Face-to-Face fundraising service**. Experience with UNICEF, other UN Agencies, Government, other bilateral and multilateral development agencies and international NGOs should be included. You can provide additional information in your own format.

Project # 1

Name of Client:	
Assignment name:	Duration of assignment (months): Start date (month/year): End date (month/year):
Approx. value of the contract (in USD):	Total number of staff of the assignment:
Please provide samples of work (link and / or attachments, please name / link clearly)	

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Project # 2

Name of Client:	
Assignment name:	Duration of assignment (months): Start date (month/year): End date (month/year):
Approx. value of the contract (in USD):	Total number of staff of the assignment:
Please provide samples of work (link and / or attachments, please name / link clearly)	

Project # 3

Name of Client:	
Assignment name:	Duration of assignment (months): Start date (month/year): End date (month/year):
Approx. value of the contract (in USD):	Total number of staff of the assignment:
Please provide samples of work (link and / or attachments, please name / link clearly)	

Date _____

Name _____

Signature _____

Company _____