

## **ANNEX B**

### **LRPS-2025-9196204**

### **LONG TERM AGREEMENT (LTA) TERM OF REFERENCE (TOR) FOR**

### **PROFESSIONAL FACE-TO-FACE (F2F) FUNDRAISING SERVICES**

#### **1. BACKGROUND/ RATIONALE**

Since 1954, the UNICEF Malaysia Country Office (MCO) has collaborated with the Government and the people of Malaysia to improve the lives of children throughout the nation. Relying solely on voluntary contributions, many from individual members of the public, UNICEF funds its programs through sustained support. The cornerstone of MCO's fundraising strategy is the regular giving 'pledge' donor program, where donors commit to ongoing contributions via credit or debit card payments or direct debit transfers.

The 2025 RFP represents a forward-looking strategy by UNICEF Malaysia to address current challenges, maintain operational continuity, and achieve PSP fundraising objectives. It also emphasizes the organization's commitment to fair competition, partnership diversification, and the sustainability of its F2F fundraising efforts.

#### **2. OBJECTIVES**

The primary objective of running the 2025 Request for Proposal (RFP) is to acquire high-quality regular giving donors for UNICEF in Malaysia.

#### **3. SCOPE OF WORK**

##### **I. Pledge Donors' Acquisition**

- a) Conduct F2F fundraising campaigns at events, streets, trucks, targeted public sites, businesses, and residential locations in defined territories as agreed with UNICEF, to solicit regular giving donations. Soliciting regular donations means collecting donations via electronic donor forms that allow a donation to be deducted from the donor's credit or debit card or bank account and paid to UNICEF on a fixed agreed schedule.
- b) Employ a strategic approach to pledge donor acquisition within defined territories related to point (a) above, by leveraging a comprehensive understanding of the market dynamics established through F2F fundraising campaigns. Actively explore and implement acquisition strategies approved by UNICEF to achieve optimal long-term value and portfolio diversity for UNICEF's investment. This entails meticulous consideration of factors such as:
  - i. Donor age group
  - ii. Minimum gift amount
  - iii. Payment methods
  - iv. Innovatively testing new sub-channels beyond traditional event bookings
  - v. Testing new markets to broaden UNICEF's reach and impact

- c) Produce fundraising campaign materials such as electronic donor forms, branding materials, pitch materials, uniforms, and others use at sites with proper management of inventories. Written approval from UNICEF for all material production must be obtained prior to production. A minimum support regarding production costs can be negotiated with UNICEF.

UNICEF maintains the rights on the intellectual property of our fundraising materials, tools and designs which are co-created and co-developed with the Contractor, and reserves the right to utilize these materials, tools and designs for other UNICEF fundraising activities which may directly or indirectly relate to the scope of F2F fundraising activities described in these terms of reference. The use of materials, designs or ideas co-created together with UNICEF must not be extended to other National or International NGOs for their fundraising activities without prior consultation and consent from UNICEF.

- d) Manage the workforce to work in agreed locations to carry on the fundraising campaign.
- e) Take all reasonable steps to recruit the volume of new pledge donors at the specified donation levels as agreed with UNICEF.
- f) Ensure, to the best of their ability, that all the necessary information of the donors is complete and accurate, and that the donors sign the electronic donor forms (as agreed by UNICEF).
- g) 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 (FR) to be ready to execute the F2F fundraising campaigns. The Contractor must have a dedicated, locally based leadership and must ensure a minimum volume of FR 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 electronic donor form (unless mutually agreed between UNICEF and the Contractor).
- c) Ensure that quality assurance procedures are in place to minimize the risk of fraudulent and other improper behaviors by the field representatives. Additionally, the Contractor is 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 FR are at no possible reputational risks.
  - ii. Ensure its employment contract with the FR complies 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 FR who are below 18 years old.
  - iv. Ensure that no FR engages in any misleading or deceptive conduct.
  - v. Ensure that apart from completing the electronic donor forms, no FR accepts any form of donations including, but not limited to, cash and gifts.
  - vi. Ensure that no FR commits any act which may compromise the image and interests of UNICEF.

- vii. Ensure that all FR comply with applicable laws and regulations while carrying out activities with UNICEF's F2F fundraising campaigns.
  - viii. Take necessary disciplinary actions against the FR for any inappropriate behavior which could compromise the public image of UNICEF.
  - ix. Make reasonable efforts to correct or mitigate the negative outcome of inappropriate behavior, including but not limited to fraud, of its current or former FR.
- d) Conduct professional Third Party (Independent) "Mystery Shopping" to carry out spot-checks and anonymous mystery shopping activities at F2F sites regularly, to ensure qualitative performance and proper behavior of the FR 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 FR. A bi-annual mystery shopping report, at minimum, must be submitted to UNICEF to ensure the quality performance and behavior of the field representatives.

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 FR on the street or at an event site (without the FR) in order to quality check that all is in order with messaging, behavior and manner, etc. FR are to be made aware of this process during their training and onboarding.

- e) Report accurate location to ensure that 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.

- f) Any complaints made to UNICEF concerning the fundraising campaign will be referred within one (1) working day to the nominated officer of the Contractor (the Complaints Officer). The complaint needs to be addressed and managed by the Contractor, who must then report back to UNICEF on the actions taken within two (2) working days. If the case requires more time, the Contractor will notify UNICEF and will endeavor to complete the action taken within five (5) working days. The Contractor is expected to handle or conduct any possible public relations activities, mainly on social media, to create a positive impression for F2F fundraising for UNICEF.
- g) Keep a register and prepare reports of the details of complaints including, but not limited to, 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 include the arrangement of F2F road trips, and any other event fundraising campaigns setup.
- b) Must inform UNICEF of its fundraising locations accurately during regular work shifts so that UNICEF can easily track the location of every individual FR at any time.
- c) 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 in Malaysia.
- d) Regarding to event strategy, bookings, and management, UNICEF requires the following partnership provisions:
  - 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 works 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 for 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 are made with UNICEF authorization 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 and participation.
  - xi. That the Contractor maintains its compliant status to access premium UNICEF event sites.

### IV. Back-end Operations, Data Management and Reporting

- a) All pledge recruitment data (including but not limited to donor's personal identifiable information, pledge and payment information, fundraiser information, campaign level information) is to be sent to UNICEF within 15-30 minutes of acquisition ONLY through integrations with UNICEF Malaysia's selected payment tokenization, payment processor and CRM.
- b) All pledge donors will be contacted (verification/welcome/fix calls) by Contractor to improve donor's satisfaction in the acquisition experience and ensure high success of first debit charging. All verification, welcome, and fix calls data (including but not limited to call date and time, call outcome, call agent) should be push to UNICEF Malaysia' selected payment gateway and CRM system. UNICEF reserves the right to modify this process or take over the responsibility of

contacting donors directly in the future, if deemed necessary. Feedback collected should be circulated back to field representatives for quality improvement. Reports detailing call volumes, donor feedback, and escalations must be shared with UNICEF monthly, as part of the performance review during monthly meetings. Note that all calls are to be recorded for training and monitoring purposes; however, no payment details should be recorded in compliance with Payment Cards Industry Data Security Standard (PCI-DSS) regulations. All PCI-DSS related terms are detailed out in (see [Annex 1](#)).

- c) In the event that a pledge fix call is performed where collection of new payment details is required, the Contractor's telephony or IVR system must be integrated with a payment collection solution that is PCI-DSS compliant solution which can be provided by UNICEF Malaysia such as IVR tokenization and first debit charge payment processing.
- d) The Contractor must also ensure that all pledges acquired are signed digitally to guarantee Data Protection, Privacy, and a best practice donor journey. Contractor needs to ensure that any system or platform, either own or third-party, used complies with the regulations of the Payment Cards Industry Data Security Standard (PCI-DSS) and in compliance with existing local laws and regulations relating to data privacy and security. To ensure PCI-DSS compliance, UNICEF will provide 2 units of Salesforce partner community licenses. Any additional Salesforce licenses required beyond the initial two will be covered by the Contractor.
- e) The Contractor must ensure that its reporting or exporting system is compatible and integrated with the UNICEF CRM system (including payment system and other system deem appropriate for accurate and swift donation processing) and provide swift adjustments for compatibility if UNICEF or the Contractor adopts any new system. This requirement applies to the Contractor, including its sub-Contractor(s), if any.
- f) UNICEF shall provide access to its existing systems, including but not limited to EverGiving and Cybersource, which are integrated with UNICEF's CRM system (Salesforce). Should the Contractor, including any sub-Contractors, elect to utilize alternative systems or platforms that are not pre-integrated with Salesforce, the Contractor and its sub-Contractors shall be solely responsible for ensuring full integration with Salesforce. Furthermore, the Contractor and its sub-Contractors shall bear all costs, expenses, and liabilities associated with such integration, including but not limited to development, implementation, and maintenance expenses.
- g) Incorporate the concept of first debit (point of sales) into the donor acquisition strategy, ensuring that appropriate measures are taken to account for and mitigate any potential negative impacts on donor engagement and retention.
- h) Related to point IV (b, c, d, e) above, the Contractor will be responsible for the provision of necessary equipment or devices required for the digital pledge acquisition service. Contractor should consistently review the digital sign-up process to ensure the best possible donor experience at the point of acquisition. The Contractor will cover the cost of each donor sign-up.
- i) In the event of an IT glitch potentially impacting the F2F fundraising campaign and donor acquisition process, the mitigation or solutions shall be collaboratively addressed and discussed with UNICEF on a case-to-case basis.
- j) The Contractor shall prepare and submit sales reports and analyses to UNICEF on a daily, weekly, and monthly basis. The Contractor is required to develop, maintain, and regularly update their

own dashboard for reporting purposes. This dashboard must include key performance indicators such as quality metrics, attrition reasons, and individual performance indicators for each fundraiser and offices. The Contractor is expected to closely monitor results on a daily basis, with particular emphasis on tracking and analyzing attrition indicators to ensure timely identification of issues and the implementation of corrective measures.

- k) If in the event if UNICEF decides to change or upgrade system for better customer experience and security, future system integration costs are expected to be covered on a co-sharing basis and are subject to mutual agreement between UNICEF and the Contractor.

### V. Strategic Analysis and New Solutions

- a) Organize and attend regular biweekly and monthly progress meetings (by phone or in-person) with UNICEF staff 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 Malaysia 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) Stay updated on new solutions that could benefit F2F fundraising, such as Virtual Reality technology and 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)

- a) Targets will be discussed and agreed on before each year begins. Upon agreement, it is the Contractor's responsibility to achieve these targets within the specified timeframe. Failure to meet targets will result in penalties that will be included in the contract.
- b) During the assignment, the Contractor must inform UNICEF as soon as it foresees 5% variance in any of the agreed targets. Contractor is required to immediately put necessary measures to maintain the agreed targets.
- c) UNICEF reserves the right to adjust the scope of work assignments as deemed appropriate.
- d) The Contractor must comply with the following requirements:
  - i. One-off donations are not commissioned.
  - ii. Satisfactory completion and accuracy of data input of electronic donor forms, with a maximum of 2% of human errors allowed in donor data submission. If the number goes above 2%, the Contractor will not charge the fee for those donors. Compulsory data as below and as per UNICEF data formatting requirement:
    - Donor's full name (as per identity card/ passport)
    - Identification card number/ passport number
    - Full mailing address
    - Email address
    - Phone number

- iii. The different KPIs, such as payment method (e.g., credit card, debit card, direct debit) and donor's age band must be agreed with UNICEF. The Contractor must provide a monthly report which includes all agreed KPIs to UNICEF and immediately put necessary measures to maintain the agreed targets.
  - iv. Fee percentage is paid per donors' twelve months donation value, payable when the first donation is realized or collected within the charging period.
  - v. For donations where the first debit is not collected at the point-of-sale, the first debit attempt will be made within the sign-up month, and the pledge statuses will be shared with the Contractor on the 1st day of the following month for fixing. The contractor shall have a total of 5 weeks to address these failed pledge records (e.g., contacting donors for alternative payment details).
  - vi. In cases of insufficient funds, UNICEF will continue to attempt charging during this 5-week fixing period, with approximately 13 processing attempts made each calendar month. If the first debit cannot be realized within the 5-week period, it will not be eligible for commission payout.
  - vii. For donors aged 26-30, a maximum cap of 20% of total new pledge donors shall apply. If this cap is exceeded, the excess donors will not be commissioned.
  - viii. Donors aged 25 and below, and those with unidentified ages, will not be eligible for fee payment. The age of donors is determined at the point of acquisition, verified against the birth date provided in their identification card, and reconfirmed during the verification and welcome calls.
  - ix. The minimum monthly donation value is set at RM55, with an average donation value of RM60 for 2025 and will increase yearly according to the market conditions. UNICEF will not be paying a fee for donations below the specified minimum donation value.
  - x. A minimum credit card (CC) ratio of 35% within each billing/invoice is required for 2025. This target will be revised every year.
  - xi. Other requirements might be added in, or some might be adjusted, according to UNICEF needs and market conditions. It will be duly informed to the Contractor with 2 months in advance.
- e. At least one annual 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.
- f. Based on the overall UNICEF fundraising growth strategy and related fundraising targets, the Contractor will be working non-exclusive in Malaysia alongside UNICEF in-house teams and other Contractors.
- g. 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 and gets explicit approval from UNICEF at least one

month in advance. 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 2*) of the UNICEF F2F Global Code of Conduct applies to all UNICEF affiliates conducting F2F fundraising activities (this includes F2F fundraising conducted door to door, business to business, on the street, at events, privately or through petitioning or two-step activity). Every FR 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.

- h. UNICEF often works to raise funds during emergency situations. As such, the Contractor must 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

- a) All reasonable steps shall be taken by the Contractor to recruit the agreed volume of new donors in accordance with the targets set by UNICEF on a monthly, quarterly, and annual basis.
- b) Donor recruitment criteria and targets are tiered according to the acquired donor's age band and split by payment type as agreed with UNICEF.
- c) The Contractor shall take all reasonable steps to recruit and maintain ensure a minimum volume of the FR to recruit the required quantity of donors.
- d) Quality reporting must be submitted to UNICEF, including weekly and monthly sales report, site and event plan and reports, complaints report, quarterly mystery shopping report.
- e) Quarterly or at least annual review meetings virtually, or via call or F2F (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. DESIRED QUALIFICATIONS, SPECIALIZED KNOWLEDGE, OR EXPERIENCE

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.

#### 6. DURATION OF LONG-TERM AGREEMENT

5 years.

## 7. TRAVEL REQUIREMENTS

Not Applicable.

## 8. GUIDELINES ON PROPOSALS SUBMISSION

Prospective Contractors are required to submit their proposals according to the following guidelines that encompass both technical and financial aspects, as described below:

### TECHNICAL PROPOSAL

The Technical Proposal should include, but is not limited to, the evaluation criteria outlined in Table 1 below:

Table 1: Evaluation Criteria and Distribution Points

TECHNICAL PROPOSAL (60%)	Max. Points
<p><b>1. ORGANISATIONAL EXPERIENCE AND CAPACITY</b></p> <p>a) Background and Experience: Company history, years of operation, and experience relevant to the TOR.</p> <p>b) Client List and Local Experience: List of clients and operational experience in Malaysia.</p> <p>c) Team Structure: Organizational structures and profiles of local leaders or account managers, including detailed resumes and member experiences.</p>	6
<p><b>2. TECHNICAL ABILITY, IMPLEMENTATION PLAN AND METHODOLOGY</b></p> <p><b>Overall Fundraising Plan Proposal (10 points)</b></p> <p>a) Provide a comprehensive description of the proposed F2F fundraising strategy, including:</p> <ul style="list-style-type: none"> <li>Detailed monthly and yearly donor acquisition targets over a 5-year span, specifying both minimum and maximum numbers of Field Representatives (FRs), along with donor's retention benchmarks at 3, 6, 12, and 24 months.</li> <li>Donor's average donation contribution amounts and preferred payment methods, with attention to varying price points across different donor segments (e.g., by age group and payment method).</li> <li>Tailored strategies for diverse donor demographics, covering payment preferences and donation amounts. Highlight innovative fundraising methods and channels that will drive donor quality and acquisition volume.</li> <li>A clear methodology outlining how these targets will be achieved, supported by innovative donor's recruitment strategies.</li> </ul>	54

*Note:*

*All targets specific in this section must clearly link back to all other sub-section below. For example,*

- *3, 6, 12, and 24-months retention target must link back to “Long term value” section. Or,*
- *Acquisition volume target must link back to min headcount and sales efficient per fundraisers showing how to achieve the target linking back to “recruitment, training and quality control”.*

*Target that deems to be inflated or unrealistic or without clear and reasonable planning will result in points deduction.*

## **Long Term Value (12 points)**

- b) Retention Analysis for Existing Contractors: Provide a detailed analysis of own donor's attrition rates at 3, 6, 12, and 24 months, including three specific action plans to improve retention. [3 points each actionable plan with specific retention target to achieve]
- c) Retention Analysis for New Contractors: Outline the top three actionable strategies to meet retention KPIs as specific in overall fundraising proposal and targets, with detailed justifications and key points. [3 points each actionable plan with specific retention target to achieve]
- d) Long-Term Engagement: Present strategies to communicate donors' long-term impact, emphasizing retention and the quality of engagement to maximize ROI.
- e) Market Adaptation: Include a detailed understanding of local donor retention dynamics, taking into account payment preferences and predicted retention rates.

## **Payment, Back-End Operations, and Reporting (10 points)**

- f) Detailed description of back-end operation processing, detailing from sign-up tools up to integration with Salesforce. It should cover all points stated in section IV. Back-end operations, data management, and reporting.
- g) Valid attestation of compliance from PCI Security Standard Council
- h) Monitoring and Reporting: Provide detailed examples of daily and weekly dashboards to track fundraiser performance, location quality, and retention metrics.
  - Daily and weekly monitoring dashboards for fundraisers and team managers, with an emphasis on approvals, cancellations, and reasons for rejections.
  - Daily location monitoring dashboard, focusing on quality indicators.

<ul style="list-style-type: none"> <li>• Daily monitoring dashboard related to retention metrics.</li> <li>• Campaign overview monitoring dashboard, including 12-month and 24-month ROI calculations.</li> </ul> <p>i) Payment Processing: Provide detailed recommendations on payment processing strategies, with a focus on optimizing recurring monthly contributions.</p> <p><b>Techniques and Collaterals (8 points)</b></p> <p>j) Fundraising Techniques and Materials:</p> <ul style="list-style-type: none"> <li>• Propose effective and innovative fundraising techniques designed to maximize donor engagement and public interaction.</li> <li>• Provide ideas for interactive and impactful donor engagement activities aimed at deepening connections with donors and enhancing the donor experience.</li> <li>• Suggest creative collateral ideas, such as digital assets, brochures, or experiential tools, to capture donor interest and engagement.</li> <li>• Include examples or case studies of past successes using similar techniques and materials.</li> </ul> <p><b>Recruitment, Training and Quality Control (6 points)</b></p> <p>k) Operational Plan: Provide a comprehensive, detailed operational plan that outlines recruitment strategies, expected working hours/days, training schedules, and operational workflows for FRs.</p> <p>l) Quality Assurance: Detail the implementation of a 'Mystery Shopping' program to continuously monitor and assess the quality and performance of FRs across all sites. Highlight procedures for addressing non-compliance and improving FR performance.</p> <p><b>Territory Management, Event Sites and Location (4 points)</b></p> <p>m) Site Management: Provide a detailed plan for managing fundraising territories, identifying event sites, and coordinating logistics for roadshows and events throughout the year. Address how these strategies will maximize donor outreach and efficiency.</p> <p><b>New Solutions and/or Innovations (2 points)</b></p> <p>n) New Solutions: Present proposals for the use of new digital tools and payment technologies to improve donor recruitment and streamline payment processing.</p> <p><b>Special Requirement: Business Continuity Plan (2 points)</b></p> <p>o) Business Continuity: Provide a comprehensive plan to maintain operational continuity during disruptions, focusing on sustaining FR engagement and donor support.</p> <p>p) Headcount Continuity: Detail strategies to ensure FR headcounts remain</p>	
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intact and capable of resuming fundraising activities once disruptions cease, including provisions for FRs unable to earn income during interruptions.	
<b>TOTAL POINTS FOR TECHNICAL PROPOSAL</b> (Minimum passing score: 36 points)	<b>60</b>
<b>FINANCIAL PROPOSAL (40%)</b>	<b>Max. Points</b>
<b>3. FINANCIAL PROPOSAL – as per <a href="#">Annex 3</a></b>  The financial proposals will be evaluated against the following:  The financial proposals will be evaluated based on a combination of the highest return on investment (ROI) and net revenue generated for UNICEF. The maximum number of points will be allotted to the proposal demonstrating the highest ROI and net revenue. Proposals that meet the threshold points in the evaluation of the technical component will be compared for financial evaluation.  The financial score will be calculated using the following weighted formula:  <b>Financial score for proposal = ROI Score (20 points) + Net Revenue Score (20 points)</b>  i. <b>ROI Score:</b> $\left[ \text{Weight for ROI} \times \frac{\text{ROI of Proposal X}}{\text{Highest ROI of Proposal}} \times 20 \right]$  ii. <b>Net Revenue Score:</b> $\left[ \text{Weight for Net Revenue} \times \frac{\text{Net Revenue of Proposal X}}{\text{Highest Net Revenue of Proposal}} \times 20 \right]$	<b>40</b>
<b>TOTAL POINTS FOR FINANCIAL PROPOSAL</b>	<b>40</b>
<b>TOTAL POINTS</b>	<b>100</b>

## **FINANCIAL PROPOSAL**

Financial Proposal should be prepared according to the following:

- The Contractor is required to download and fill in the Income Simulation Template (see [Annex 3](#)). All Contractors' Financial Proposals will be evaluated using the Income Simulation Template.
- The Income Simulation Template is based on UNICEF donor retention data, which includes information related to the donor's age band and payment method. This data serves as a basis for calculating projected income and evaluating Financial Proposals.
- A clear outline of the pricing structure, payment terms, and any potential additional charges, that is accurate, transparent, and consistent with the technical proposal.
- By submitting a proposal, the Contractor acknowledges and agrees that all costs outlined in the proposal represent the full and complete costs to be negotiated and finalized with UNICEF during the negotiation process. Unless explicitly authorized in writing by UNICEF, any future costs not identified or disclosed by the Contractor at the time of submission will be the sole

responsibility of the Bidder. The Bidder agrees to cover such undisclosed costs, and no additional compensation shall be requested from UNICEF for these amounts.

### 9. PROPOSED PAYMENT SCHEDULE

By Milestones or Deliverables

- a) Fee percentage is paid per donors' twelve months donation value, payable when the first donation is realized or collected within the charging period.
- b) Fee percentage is also tiered according to the acquired donor's age band, and payment type. Donor's age is based on age at point of acquisition which follows the identification card birthdate and is reconfirmed in the verification and welcome calls.
- c) The compensation or clawback scheme for donor attrition should be described clearly in the financial proposal. If a donation is not realized within thirty (30) days of the first, second, third, fourth, fifth or sixth of direct debit months, a percentage of the contractor's fee shall be deducted and refunded to UNICEF as a form of credit note, or direct deduction from monthly invoice. The fee will be refunded based on the following criteria.

Criteria to activate clawback within month 1 to month 6 after the first payment is collected:

- Cancellation Status – When an active donation is canceled or terminated by the donor, including cases involving refunds.
- Rejected/Unrealized Donors – An active donor who misses a donation in a given month due to payment rejections during the bank processing or a change in payment details, such as an expired or updated credit card.
- Downgrade status – When an active donation amount is reduced from the original sign-up amount.

UNICEF favourably welcomes a clawback scheme of 6 months and more.

- d) The Contractor shall issue a monthly invoice to UNICEF, showing the amount of fees payable and the number of approved donor forms for the billing period.
- e) The payment term is thirty (30) days upon the receipt of invoice.
- f) Payments will only be made upon satisfactory outcomes of both the quantitative and qualitative deliverables. The Contractor may be required to undertake remedial work to deliverables submitted prior to acceptance and payment.

### 10. EVALUATION OF PROPOSALS

In making the final decision, UNICEF considers both technical and financial aspects. The evaluation team first reviews the technical aspect (including by reference to its legal requirements (i.e., General Terms and Conditions and other relevant provisional terms) of the offer followed by the review of the financial offer of the technically compliant proposer(s).

For this Request for Proposals (RFP), the weightage allocated to the Technical Proposal is 60% (i.e., 60 out of 100 points). Only proposer(s) that score at least minimum of 30 points of total Technical Evaluation points shall proceed to Financial Evaluation stage. Financial Proposals from proposer(s) that do not meet the minimum technical threshold will not be opened.

Total points allocated for the price component is 40. The maximum number of points will be allocated to the highest ROI proposal and highest net revenue proposal that is opened and compared with other Contractors who passed the Technical Proposal.

### **11. CONTRACT MANAGEMENT**

The contract will be supervised by the Contract Manager. Daily management of the contract will be carried out by the F2F Fundraising Officers.

### **12. UNICEF RECOURSE IN CASE OF UNSATISFACTORY PERFORMANCE**

In the case of unsatisfactory performance, this would be highlighted in the progress meeting and the Contractor must ensure steps would be taken to improve productivity. Continuance of the unsatisfactory performance may result in with-holding of payments until quality deliverables are met. If the Contractor is unable to complete the assignment, the contract will be terminated by notification letter sent 30 days prior to the termination date.

### **13. CONDITIONS AND ADMINISTRATIVE ISSUES**

- a. The Contractor shall utilize his own resources, materials, and facilities, including, but not limited to, its own computer(s) in the execution of work. The Contractor's fee shall therefore be inclusive of all office administrative costs.
- b. The Contractor's focal point appointed to manage the work required shall be reachable during office hours.
- c. All persons engaged under UNICEF institutional contract shall be subject to the UN Supplier Code of Conduct: <https://www.ungm.org/Public/CodeOfConduct>