

Terms of Reference for Institutional Contracts

1. Identification

Description of the services:	Individual donor retention survey and consultant service
Expected start date:	1 September 2021
Expected completion date:	31 July 2022
Reporting to:	Chief of Section

2. Background and objectives

This ToR is proposed to contract a consulting service provider to help UNICEF China Office understand individual donors' experience, mainly focusing on retention and increasing brand loyalty and UNICEF's reputation among donors and philanthropy market.

The intention of conducting this survey is to understand donor rationale and what the underlying motivations for joining UNICEF's pledge donor programmes are. Alternative retention strategies need to be created that appeal to the different donors' segments to improve loyalty. This is not only for the long-term lifetime value from each donor, but also to protect and enhance UNICEF's reputation.

Recently, the retention rates have decreased because of multiple reasons among these new donors. Therefore, the main deliverables of this survey are two-fold: 1. To conduct donor segmentation according to demographic features and 2. To design detailed donor retention journeys (called "line and circle") for each segment. Moreover, there are many donors cancelling their pledge by simply terminating auto-deduction agreement from payment platform (WeChat and Alipay). After a planned payment deduction, UNICEF receives a code from such group donors which is identified numerically as 3045. To save 3045 donors, our call centre team is spending much time and efforts in contacting these donors to try and save them from cancelling their pledge. This survey also needs to satisfy business requirements to improve the 3045-saving campaigns in a more efficient and effective way.

In summary, this ToR is aimed at -maintaining donors' loyalty with UNICEF, mainly targeting the new donors acquired since year 2020. The selected agency will conduct a survey and consulting service that will satisfy retention needs and also provide suggestions or solutions towards digital and call centre business. Items in section 3 scope of work are summarized after internal confirmation with three teams.

3. Scope of Work

- General goals for this project
 - Besides the existing UNICEF "PROMISE" rings and certificates, propose other incentives to retain donors for at least 12 months
- Market research, survey methodology and implementation
 - Market / competitor analysis
 - Competitors include international organizations and national organizations like One foundation, China Foundation for Poverty Alleviation and other two competitors etc. Comparing dimensions should include all touch points of acquisition process, retention process or solution. Also charity organizations on Tencent should be researched for better content delivery solution.
 - Methodology instruments
 - How project would be implemented, what methodology would be used to clarify and prove the accuracy of project outputs. What supporting information should be provided to the services provider.

- Project plan and delivery plan (timeline, milestone etc.)
 - After a thorough understanding of the project requirements and expectations, a draft project timeline is needed. Timeline should clarify the resources allocation, milestones, deliverable documents and quality standard of deliverables.
- Project implementation
 - Take the lead to rollout project, timely report to UNICEF and deliver outputs. Timely escalation for special cases or project timeline updates, or other issues need to be reported to UNICEF.
- Deliverables (survey, interview, English/Chinese version reports, etc.)
 - Deliverables should satisfy expectation on both time and quality required. Bilingual documents (English and Chinese) are expected.
- Donor segmentation and feature analysis / Current donor retention journey (“Line and Circle”) analysis
 - Portrait analysis: segmentation, interest, satisfaction, value, lifestyle, share habit analysis etc.
 - Target donor analysis should be produced through a set of actions including questionnaire, quantitative analysis, qualitative analysis etc. The analysis should clarify the features of target donors, and clearly explain their perspectives towards philanthropy action.
 - How does UNICEF satisfy new donors? Commitment and motivation/typology analysis.
 - Targeting different segments of new donors (acquired since year 2020), what is their biggest intension to become a UNICEF pledge donor. How does the identity as UNICEF donor satisfy their psychological needs?
 - Current retention/touchpoint analysis (whole journey, before rings campaign and after)
 - Base on the results of competitor analysis report, what are the advantages and disadvantages of current “Line & Circle” solution. This analysis reports would provide insights and advises on how to improve current donor care and retention services, like content distribution platforms, contents style and format, sending frequency etc.
 - Propose ways to encourage more diverse user-generated content, which hopefully could be incorporated into the donor retention journey
- Improvement solution by different segmentation
 - Journey and touchpoints
 - Base on segments and analysis results, different journey and touch points should be designed for the purpose of higher retention. For example, if the donors are divided into three segments, three different sets of journeys and touchpoints should be designed.
 - Content style, content format, delivery channels, delivery frequency etc.
 - For every touchpoint, content style and format should be also considered according to different segments for the purpose of higher opening rate, click rate or participate rates. Also, delivery platform should be considered and decided for better donor engagement.
 - Provide suggestions on test plan and implementation
 - Consulting team should also consider and discuss with UNICEF on test plan to prove the accuracy of the test results.
- Solution for 3045 savings campaign (donors who cancelled auto-deduction agreement)
 - Motivation analysis and cancellation reason analysis
 - Clarify the reason of why they join and why they leave.
 - Segmentation based on data
 - Based on data analysis, interview and questionnaire implementation, find out how to divide these donors for better saving action.
 - Solution of differentiation on following retention action (contents, format, channels etc.)
 - Solution on how to save these donors to continue donate to UNICEF, what incentives and touchpoints are proper towards these people?

4 Deliverables and payment schedule

4.1 Deliverables (all below items should be in both Chinese and English), details please refer to above section 3.

- Market research report
- Survey methodology instrument
- Project plan with milestones and deliverables schedule
- Survey and interview reports
- Regular project reports and meeting presentations
- Donor portrait analysis
- Typology report (How does UNICEF satisfy new donors?)
- Current retention/touchpoint analysis
- Touchpoint management / improvement solution for every segment (new journey and touchpoints design)
- Content analysis report (solution on Content style, content format, delivery channels, delivery frequency etc.)
- Suggestions on test plan and implementation
- Two key presentations / workshops (Chinese)

4.2 Payment

- Invoices are paid on actual assignment completed. Normally UNICEF pays the services and products upon satisfactory completion of delivery and submission of invoice.
- Bills shall include the breakdown of costs reflecting each specific item handled/delivered.
- Final payment schedule will be based on the financial proposal from the successful firm, on the understanding that all payments will be against deliverables as outlined above. No advance payments will be entertained by UNICEF.

5 Qualification requirements

To meet with minimum qualification requirements, the vendor shall have:

- Competency to provide quality services with required time limitation with required quantities.
- Should have proven experience or qualification to provide good services to UNICEF.

6 Evaluation criteria

The evaluation procedure will focus on both technical and financial suitability. A 70%/30% weighting shall be applied for technical and financial compliance respectively.

Only firms scoring at least 70% of the maximum score during technical evaluation will be considered for financial evaluation.

Technical Evaluation Criteria

1. Overall response - 10 points

1.1 Completeness of response - 5 points

1.2. Overall concord between RFP requirements and proposal - 5 points

2. Proposed Methodology and approach - 25 points

2.1 Relevance and quality of proposed methodology - 15 points

2.2 Project timelines and workplan - 10 points

3. Experience and qualifications of firm and key personnel - 35 points

3.1. Company profile (establishment, facilities, personnel, financial capacity) - 5 points

3.2 Experience in similar projects, i.e. market survey in non-profitable organization, with specific focus on individual fundraising aspect- 15 points

3.3. Relevance of qualifications & expertise of proposed team of consultants - 15 points

Total technical: 70 points

7 Content of technical proposal

Structure of the Technical Proposal

The Technical Proposal should include but not limited to the following:

- Corporate Profile highlighting the bidders' qualifications and experience in implementing the assignment, please include details of specific experience with similar assignments in the past five years.
- Detailed understanding of UNICEF's requirements for this assignment and bidders value proposition
- Detailed Methodology/approach to project demonstrating how you meet or exceed UNICEF requirements for this assignment
- Proposed timeline and milestones
- Project dependencies and assumptions
- Bidders are requested to back up their submissions by providing:
 - Evidence in the form of job completion certificate, contracts and/or references.
 - Three case studies containing the following information:
 - Name of Client
 - Title of the Project
 - Year and duration of the project
 - Scope of the Projects/Requirements
 - Proposed Solutions and Outcome – include visuals, web-links, etc.
 - Team members on each of the project and their specific roles
 - Project timelines (start and end date year, and any other information necessary)
 - Reference /Contact person details
- Details of the Proposed Team for the assignment including the following information:
 - Title/Designation of each team member on the project
 - Educational qualifications and professional experiences
 - Past experience in working on similar projects and assignments – List all similar projects worked on and roles on those projects
- Project implementation and work plan showing the detailed sequence and timeline for each activity and days necessary for each proposed team member
- Quality assurance mechanism and risk mitigation measures put in place

The Price Proposal shall include, but is not limited to, the following:

The format shown on the following pages should be used in preparing the price schedule. The format includes specific expenditures, which may or may not be required or applicable but are indicated to serve as examples.

PRICE SCHEDULE				
DESCRIPTION OF ACTIVITY/ITEM		ESTIMATED AMOUNT	UNIT RATE	TOTAL
1.	Analysis			
2.	Reports			
3.	Supports and services			
4.	Other related costs			

***Continue separately as necessary**

8 Award Criteria

Further to para 6 above, the following methodology will be used for evaluation of price proposals and contract award. Only price proposals of the technically responsive Offerors will be opened and evaluated.

The price should be broken down for each component of the proposed work. The total amount of points allocated for the price component is 30. The maximum number of points will be allotted to the lowest price proposal that is opened and compared among those invited firms/institutions which obtain the threshold points in the evaluation of the technical component. All other price proposals will receive points in inverse proportion to the lowest price; e.g.:

$$\text{Score for price proposal } X = \frac{30 * \text{Price of lowest priced proposal}}{\text{Price of proposal } X}$$

All prices/rates quoted must be exclusive of all taxes as UNICEF is a tax-exempt organization.

The proposal obtaining the overall highest score after adding the scores for the technical and financial proposals is the proposal that offers best value for money.

UNICEF will award the contract to the vendor whose response is of high quality, clear and meets the project goals. The price/cost of each of the technically compliant proposals shall be considered only upon evaluation of the above technical criteria.