

## **TERMS OF REFERENCE**

### **Call for Direct Dialogue Agency**

### **Face-to-Face Fundraising**

#### **SECTION A: Introduction & Background**

Plan International Hong Kong (hereafter “PIHK”) is a part of Plan International, one of the global leading development organisations dedicated to improving the lives of children, particularly girls. Plan International works in over 80 countries to help create a world where we are all equal. Our programmes concentrate on making sustainable improvements to the quality of life in the areas of health, education, environment and livelihood. We have also been working to protect girls from discrimination and get the education, skills and support they need. Our purpose is to strive for a just world that advances children’s rights and equality for girls.

To enhance public awareness of our initiatives and to solicit sustainable donations effectively, we have identified face-to-face communication as one of the most effective fundraising channels. Through engaging citizens in various public venues directly, our fundraisers can better share our mission and work projects with them, this personal interaction by all means encourages individuals to become monthly donors, thereby providing us with the sustainable resources needed to uphold children's and girls’ rights and transform their lives.

The Social Welfare Department has issued Public Subscription Permit(s) under the Summary Offences Ordinance (Cap. 228) to authorise PIHK to conduct Solicitation of Signed Authorisation Forms in respect of donations for charitable purpose(s) in public places.

For more information: <https://www.gov.hk/en/theme/fundraising/welcome/#psp>

In pursuit of cost efficiency and high-quality service delivery, PIHK is seeking a direct dialogue agency to provide donor acquisition services. The agency’s role is to actively promote our fundraising programs, including the Child Sponsorship Program, Girls Fund, and Plan with Children monthly programme among the general public in Hong Kong. Open tendering is adopted. All interested agencies are invited to tender.

## **SECTION B: Objectives**

Face-to-Face Street Fundraising aims:

- I. To introduce PIHK's background and raise awareness of children and girls' issues among the general public
- II. To acquire the Child Sponsorship Programme monthly donors to support our community development work in developing countries.
- III. To acquire Girls Fund monthly donors to support our projects in empowering girls and young women to learn, lead, decide, and thrive, and protect them from inequality and violence.
- IV. To acquire Plan with Children monthly donors to safeguard children's rights in developing countries and Hong Kong and let them grow up healthily and happily.

## SECTION C: Fundraising Requirements and Event Schedule

The Face-to-Face fundraising service is expected to last for 16 months (1 March 2025 – 30 June 2026) and the following manpower and objectives are expected. Various events will be organised to facilitate face-to-face monthly donor recruitment.

| Period                 | Teams | Requirements                       |
|------------------------|-------|------------------------------------|
| March 2025 – June 2025 | 2     | 2 Team Leaders + 4 – 6 Fundraisers |
| July 2025 – June 2026  | 3     | 3 Team Leaders + 6 – 9 Fundraisers |

### Minimum objective:

**In FY25** (four months) 80 new donors<sup>1</sup> per month on average, meaning approximately 320 donors for the period of 1<sup>st</sup> March to 30<sup>th</sup> June 2025.

**In FY26** (twelve months) 120 new donors per month on average, meaning approximately 1,440 donors for the period of 1<sup>st</sup> July 2025 to 30<sup>th</sup> June 2026.

|      | Period                        | Requirements                              |
|------|-------------------------------|---|
| FY25 | Q3 - March 2025               | 80 donors                                 |
|      | Q4 - April to June 2025       | 240 donors<br>(80 donors x three months)  |
| FY26 | Q1 - July to September 2025   | 360 donors<br>(120 donors x three months) |
|      | Q2 - October to December 2025 | 360 donors<br>(120 donors x three months) |
|      | Q3 - January to March 2026    | 360 donors<br>(120 donors x three months) |
|      | Q4 – April to June 2026       | 360 donors<br>(120 donors x three months) |

<sup>1</sup> The average donation per donor per month is HK\$240

## Planned Event Schedule

|      | Planned Event           | Details  | Proposed Timeline |
|------|-------------------------|--|-------------------|
| FY25 | Run for Girls           | “Run For Girls” is a charity run since 2017 with the aim of fighting for and promoting girls’ rights and justice, protecting girls in developing countries from discrimination, inequality and violence.   | Apr 2025          |
|      | No Go Tell              | “No Go Tell” is a child safeguarding education and fundraising event with the aim of raising public awareness of child safeguarding concepts and building safeguarding knowledge and skills.   | Jun 2025          |
| FY26 | Hong Kong Book Fair     | The joining of the HK Book Fair aims to raise awareness of children's and girls’ issues and promote Plan International’s work. Books relating to children's and girls’ issues will be sold to raise one-off income to support our work.  | Jul 2025          |
|      | Donate a Pencil         | The “Donate a Pencil for Girls” campaign has been organised since 2013 with the aim of supporting girls’ education and raising public awareness of girls’ rights. Funds raised will be used to support Plan International’s projects in developing countries to advance girls’ rights. | Oct to Nov 2025   |
|      | Hong Kong Mega Showcase | The joining of the HK Mega Showcase aims to raise awareness of children's and girls’ issues and promote Plan International’s work.   | Dec 2025          |
|      | CNY Promotion           | “CNY promotion” aims to raise awareness of children's and girls’ issues and promote Plan International’s work.   | Jan to Feb 2026   |

## SECTION D: Partnerships

As a child protection organisation, PIHK emphasises the following expectations for its partners:

- **Child Protection:** Develop and implement strategies to create a safe environment that minimises the risk of child abuse in alignment with PIHK's child protection policies.
- **Fraud and Corruption Prevention:** Identify potential fraud and corruption risks during the planning stages and implement controls to mitigate these risks.
- **Political Neutrality:** Ensure all content and influencing strategies are politically neutral and consistent with PIHK's policies and consider the best interest of PIHK.

The partner organisation appointed by PIHK is expected to fulfil the following responsibilities:

- **Conduct Fundraising Activities:** conduct face-to-face fundraising activities at events and designated public places to solicit regular monthly/yearly donations.
- **Recruit New Donors:** implement reasonable strategies to meet the agreed-upon monthly targets for the recruitment of new monthly donors.
- **Collect Donations:** collect donations in the form of a pledge made by a donor to have an amount deducted from the donor's bank account or credit card account on a monthly or one-time basis as a donation to PIHK.
- **Ensure Accurate Documentation:** ensure all donation forms are completed accurately and signed by donors.
- **Disclose Terms and Conditions:** disclose and draw the attention of prospective donors to the important terms and conditions of the donation form.
- **Monthly Planning and Reporting:** Prepare and submit monthly location plans of all fundraising teams to PIHK for coordination and monitor and report the recruitment performance to PIHK.
- **Data Management:** ensure that all donor data is transferred accurately and securely, with appropriate measures for storage and confidentiality.
- **Staff Recruitment and Planning:** plan and recruit sufficient fundraisers to provide the monthly donor recruitment service.
- **Build Supporter Relationships:** build strong positive relationships between PIHK and donors through face-to-face conversations and recruitment.
- **Participate in Training:** Attend training and sharing sessions organised by PIHK to enhance skills and knowledge relevant to fundraising and donor engagement.

## SECTION E: Essential Requirements of Partners

Partner Proposals must meet all of the essential requirements set out in Section E. Partner proposals that fail to meet any of such essential requirements shall be disqualified and not considered further.

The partner must assemble the team(s) with the necessary experience, skills, and expertise and fulfil the following requirements:

### (a) Code of conduct for fundraisers

- The partner must ensure that the fundraisers adhere to the following code of conduct:
  - **Confidentiality:** fundraisers **must** keep all information confidential and secure, and **not** disclose it to others
  - **Integrity:** fundraisers **must not** engage in any misleading and deceptive conducts
  - **Legal Compliance:** fundraisers **must not** violate any applicable laws or regulations
  - **Protection of Interests:** fundraisers **must not** engage in any act that may jeopardise the interests of PIHK
  - **No cash donations:** fundraisers **must not** solicit, procure or accept any cash donations or gifts

Any breach of the code of conduct listed above may lead to immediate investigation; and termination of the relevant fundraisers' appointment and/or termination of the entire agreement.

### (b) Necessary reports and materials

- The partner is responsible for providing, at its own cost:
  - **Promotion materials:** distribute identification badges and presentation folders for fundraisers
  - **Licenses and permits:** distribute any necessary licenses and permits, including but not limited to Public Subscription Permit (PSP)
  - **Recruitment results:** prepare and submit daily, weekly and monthly donor recruitment results to PIHK

### (c) Quality control and risk management

- The partner and its team(s) must ensure that the following measures are in place to minimise the risk of fraud and other misconduct by the fundraisers, including:
  - **Background checks:** conduct thorough background and reference checks on all potential fundraisers prior to employment.
  - **Code of Conduct dissemination:** develop a code of conduct that is widely disseminated to fundraisers during training and briefing provided by the partner
  - **Supervision:** all fundraisers are closely supervised by team leaders at each fundraising location



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- **Donation Form Tracking:** each donation form has a unique serial number and reasonable efforts are made to ensure that all donation forms, including completed and voided forms, are accounted for at all times
- **Form Submission:** all completed or voided donation forms must be returned to PIHK within seven (7) days

The partner shall be fully liable and responsible for the acts, neglect, omission and conduct of such persons. PIHK reserves the right to require any replacement of any member of the team.

## SECTION F: Evaluation Criteria for Selection

This section describes the evaluation criteria for selecting a direct dialogue agency that aligns with PIHK's values and goals. The criteria are designed to identify a suitable partner's capability that enables PIHK to recruit monthly donors effectively at a reasonable cost.

| Evaluation Criteria                    | Description  |
|--|--|
| Cultural Alignment                     | <ul style="list-style-type: none"> <li>• Company's values</li> <li>• Company's mission</li> <li>• Company's working style</li> </ul>   |
| Quality of Products / Services Offered | <ul style="list-style-type: none"> <li>• Fundraising strategies that align with PIHK's mission and goals</li> <li>• Training and support to fundraisers and fundraising activities</li> <li>• Working procedures</li> </ul>  |
| Past Experience and References         | <ul style="list-style-type: none"> <li>• Previous records of performance and service scopes</li> <li>• Relevant experience in presenting children's issues to the general public.</li> <li>• No. of complaints related to street fundraising in the past 5 years</li> <li>• Client references and client satisfaction</li> </ul> |
| Pricing                                | <ul style="list-style-type: none"> <li>• Detailed pricing structure</li> <li>• Payment terms include invoicing frequency, payment methods, additional fees, etc.</li> </ul>  |



## SECTION G: Application Procedure

Interested companies need to submit the below documents in sealed plain envelopes with the Tender Reference Number '**DD 2025 F2F Fundraising**'. The sealed plain envelope must not bear any indication which may relate it to a particular service provider.

The deadline for submission of the proposal is set **on or before 5:00 pm on 17 January 2025** Hong Kong Time ("Closing Date") and the proposal should be delivered to the Tender Box at the following address. Any late submissions will not be considered.

21/F, 9 Chong Yip Street,  
Kwun Tong, Kowloon

If a black rainstorm warning or tropical cyclone warning signal No.8 or above is hoisted or in force at or before 5:00 pm on 17 January 2025, the deadline for submission will be extended to noon on the following working day. "Working Day" means any day other than a Saturday, a public holiday, gale-warning day or black rainstorm warning day.

After the submission of proposals to PIHK, tenderers shall not attempt to initiate any further contact, whether direct or indirect, with PIHK on their proposals or the invitation to submit proposals. PIHK shall have the sole right to initiate any such further contact and all such contacts and any replies of the company thereto shall be in writing or formally documented in writing.

Please complete the following documents:

- [Annex I: PIHK Face-to-Face Fundraising Form of Tender](#)
- Quotation
- Proposal

The results of the tender will be announced **within 14 days** after the submission deadline.

### Contracts Terms

- **Tender Validity:** The validity period of the tender must be adhered to until its expiration, as specified by PIHK.
- **Acceptance Notification:** Upon PIHK's formal notification of acceptance of a quotation, both parties shall be bound by these Terms and Conditions.
- **Contract Drafting:** The initial draft of the contract shall be prepared by the tenderer at their own expense. The contract shall take effect only after both parties have mutually agreed to its terms and signed it.

For enquiries, please email Yat Ng at [yat.ng@plan.org.hk](mailto:yat.ng@plan.org.hk) or call at 3405 5329 or Nicole Hui at [nicole.hui@plan.org.hk](mailto:nicole.hui@plan.org.hk) or call at 3405 5371

PIHK reserves the right to undertake post-tender negotiations prior to the offer of the contract.

## **Annex**

[Annex I Face-to-Face Fundraising Form of Tender](#)