

## TERMS OF REFERENCE

**Individual Contractor: Training & Quality Monitoring Consultant (FULL TIME) – Open to Indian Nationals only**

**Duty Station:** Hyderabad or Chennai; with travel to field locations

**Contract Duration:** 06 months (full-time) up to 31 December 2022

**Closing Date:** 23<sup>rd</sup> May 2022

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

The potential for face-to-face fundraising to address the needs of India's children in the coming years is incredible. Rapid growth and expansion of the F2F channel through 2022 and beyond is essential to ensure India's long-term program funding goals are realised. India is a priority market for UNICEF and unlocking the full potential of the F2F channel is key to realising the growth of Individuals fundraising in the country. In 2021, more than 73,500 new pledge donors were acquired through the F2F channel, and it is anticipated that recruitment in 2022 will exceed 1,00,000 new pledge donors. The active database of pledge donors now exceeds 1,00,000 and the goal is to increase this significantly in 2022. F2F fundraising is the highest volume recruitment channel for ICO IG team, and donors recruited through this channel are essential to realise planned pledge income growth of India County Office over the current strategic cycle. In addition to the above, it is equally important that the balance between volume and quality is maintained and F2F agencies acquire quality donors for long term value. There is now a requirement for an experienced trainer to support the national growth of operations through 2022.

### **2. PURPOSE OF ASSIGNMENT**

The Training & Quality Monitoring consultant will be responsible for developing content and delivering high quality trainings/workshops with best-practice driven training materials that will be in line with the Key Performance Indicators for F2F Fundraising agencies. The individual will be expected to include best practices and quality driven content in all the trainings and workshops she/he develops and delivers. The mode of trainings / workshops will primarily be face to face; however virtual trainings might also be put into place if that is the need of the hour due to the COVID pandemic. The goal is 'excellence in every conversation' being undertaken in the field and this consultant will play a key role in raising standards of F2F fundraising within UNICEF ICO and the wider market.

### **3. OBJECTIVE/S**

To hire a consultant with leadership experience in face to face fundraising/marketing, who will be responsible for leading training development and implementation strategies, along with quality control responsibilities for the face-to-face teams of pledge acquisition authorized agencies across the country keeping the F2F goal of "Excellence in every Conversation" in mind. The consultant will need to have previous experience working at a national level within a face-to-face operation as a Trainer.

### **4. MAJOR TASKS TO BE ACCOMPLISHED**

- a) Design and execute specific training journeys: for Fundraisers & Team Leaders/Managers specific to the areas mentioned below that are aligned to UNICEF, the Campaign & principles of the code of conduct. Approx. 12 Training/Workshop/Sessions.
  - i. Soft Skills focusing on F2F vision of excellence in every conversation
  - ii. Technical Skills & knowledge
- b) Design & execute a training focused on recruiting 'Overs" (Individuals above the age of 35 years) for Team Leaders and Managers who can then train their FRs with better skills and scripts focused on the above. Approx. 12 Training/Workshop/Sessions.
- c) Feedback and fundraiser performance evaluation: Provide feedback and set corrective measures on the findings of the mystery shopping agencies and via data analysis related to the KPIs set in the contract. delivery, attrition performance, quantitative feedback from QC processes).

- d) Develop a UNICEF functioning knowledge workbook which can be used by FRs and Trainers to brush up their knowledge on UNICEF that will enable them to have meaningful conversations with people.
- e) Design and execute refresher training pack for fundraisers working on the UNICEF Campaign. Approx. 6 online sessions.

## 5. DELIVERABLES AND DEADLINES

S. No.	Major Task	Deliverable	Specific delivery date/deadline for completion of deliverable	Estimated travel required for completion of deliverable
1.	Design and execute specific training journeys: for Fundraisers & Team Leaders/Managers specific to the areas mentioned below that are aligned to UNICEF, the Campaign & principles of the code of conduct. - Soft Skills focusing on F2F vision of excellence in every conversation - Technical Skills & knowledge	Training designed and content related to fundraising skills and UNICEF campaign developed for implementation.	End of Month 1	1 Trip to Delhi for 3 days as part of orientation of UNICEF
		Training Designed and content for TL/Managers based on skills, campaign, motivation to drive productivity & Performance management developed for implementation	End of Month 2	N/A
		Executed trainings for Fundraisers and submitted a monthly report highlighting the key areas of focus and take away from the trainings.	Month 2 & 5	2 Trips for 1 day to Hyderabad or Chennai 2 Trips for 1 day to Kochi 2 Trips for 1 day to Pune 2 Trips for 1 day to Kolkata 2 Trips for 1 day to Mumbai
		Executed trainings for TL/Managers and submitted a monthly report highlighting the key areas of focus and take away from the trainings.	Month 3 & 5	1 Trip for 2 days to Hyderabad or Chennai 1 Trip for 2 days to Kochi 1 Trip for 2 days to Pune 1 Trip for 2 days to Kolkata 1 Trip for 2 days to Mumbai

2.	Design & execute a training focused on recruiting ‘Overs’ (Individuals above the age of 35 years) for Team Leaders and Managers who can then train their FRs with better skills and scripts focused on the above.	<p>Training designed and content related to strategy of recruiting higher age donors developed for implementation.</p> <p>Executed the trainings to TLs/Managers and submitted a monthly report highlighting the key areas of focus and take away from the trainings.</p>	<p>End of Month 2</p> <p>Month 3 &amp; 5</p>	<p>N/A</p> <p>Travel included in point 1.</p>
3.	Feedback and fundraiser performance evaluation: Provide feedback and set corrective measures on the findings of the mystery shopping agencies and via data analysis related to the KPIs set in the contract. delivery, attrition performance, quantitative feedback from QC processes).	<p>Consolidated the Mystery Shopping reports bringing out the key recommendations to be provided to Agency as feedback.</p> <p>Training designed and content based on the findings from the mystery shopping recommendations developed for implementation.</p> <p>Field trainings or sessions for individual agency FRs/TLs, addressing the mystery shopping findings implemented. A quarterly report on the same to be submitted.</p>	<p>Monthly starting from Month 2</p> <p>Monthly starting from month 2</p>	<p>N/A</p> <p>Approx. 2 days per city, 5 cities as mentioned above. Will be paid on actual travel undertaken.</p>
4.	Develop a UNICEF functioning knowledge workbook which can be used by FRs and Trainers to brush up their knowledge on UNICEF that will enable them to have meaningful conversations with people.	Prepare and submit a handbook (PDF version) capturing information about UNICEF, Campaign and UNICEFs Fundraising practices, FAQs etc. that will treat as a information handbook for	End of November 2022	N/A

		fundraisers in the field.		
5.	Design and execute refresher training pack for fundraisers working on the UNICEF Campaign.	Training designed and content developed for online sessions for implementation.	End of Month 1	N/A
		Executed the refresher online sessions and submitted a monthly report for the same.	Monthly starting in month 2	N/A

## 6. DUTY STATION

Hyderabad or Chennai

## 7. OFFICIAL TRAVEL INVOLVED (ITINERARY AND DURATION)

There will be 21 trips with 33 days in total to the 5 cities mentioned above, Travel will be paid on actual number of days and places travelled and in line with the financial quote submitted.

Consultant shall be required to include the cost of air ticket in the financial proposal. Travel cost shall be calculated based on economy class travel.

## 8. ESTIMATED DURATION OF CONTRACT (FULL TIME)

Approx. 6 Months, however not beyond December 2022.

## 9. COST FIXED BY UNICEF FOR PER-DIEM AND AIRPORT TRANSFERS

The selected candidate will be paid fixed amount towards per-diem and Airport transfers, as follows:

**Per Diem:** INR 2,500 per day for Kochi and INR 3,500 per day for other locations. This cost includes accommodation, meals, etc.

**Airport transfers:** INR 500/- per transfer (total 84 transfers for 21 trips).

Payment will be made based on the fixed prices and when actual trips are undertaken.

## 10. QUALIFICATIONS / SPECIALIZED KNOWLEDGE / EXPERIENCE/ COMPETENCIES (CORE/TECHNICAL/FUNCTIONAL) / LANGUAGE SKILLS REQUIRED FOR THE ASSIGNMENT

- i. Educational Qualification -bachelor's degree & above in any stream
- ii. Minimum 2 years of experience within a Face-to-Face team (Fundraising Coach/Trainer, Fundraising Manager etc.) is a must
- iii. Knowledge of non-profit individual giving in the India Market
- iv. Good knowledge of English & Hindi is a must. Knowing a regional language will be an asset.
- v. Prior experience of working with Non- Profit Organizations / UN

## 11. SELECTION PROCESS (Quality and Cost Based Selection (QCBS))

Initial shortlisting of the CVs received will be done on the following 2 criteria:

- i. Educational Qualification: Graduate in any field.
- ii. F2F Fundraising Experience – minimum 2 years of relevant experience is a must.

*The technical and financial evaluation will have weightage of 70 [Technical] and 30 [financial].*

- *Technical Evaluation will include a telephonic/skype interview of the candidate which will include a training presentation on ‘Key F2F Fundraising Skills (Both Soft & Technical) and Present how trainings in the past have improved/Influenced KPIs of a Campaign/team’ not exceeding 20 minutes, which will be followed by questions from the panel.*

*The objective will be to judge the candidate on the following parameters:*

- o *Relevant experience*
- o *Experience of developing and implementing a training at a national level. Understanding of the training needs of F2F fundraising operations and the communication skill (both written and oral) required to deliver excellent training sessions.*

<b>Interview Criteria</b>	<b>Max. Marks</b>
Education Qualification – Graduate in any field	5
Face to Face Fundraising experience as a trainer for min 2 years	10
Interview: Design and flow of Presentation – 10 marks Technical Understanding of Face-to-Face Fundraising trainings 15 marks Leadership & Training skills with correlating results – 15 marks	40
Knowledge of non-profit individual giving in the India Market	15
<b>Total</b>	<b>70</b>

**Only candidate scoring 49 marks and above will be considered technically responsive and the financial offers for those candidates will be opened.**

## **12. PAYMENT SCHEDULE**

Payment will be linked to monthly reports which includes specific deliverables to be submitted by the consultant.

### **HOW TO APPLY:**

The application to be submitted through the online portal and should contain three separate attachments:

- A Cover letter explaining suitability for position **(to be uploaded online under “Cover Letter” tab)**
- Curriculum Vitae (CV) **(to be uploaded online under “Resume” tab)**
- A financial proposal indicating all-inclusive monthly professional fee, as per the template attached. Please do not forget to specify your name in the file while saving **(to be uploaded online under “Financial Proposal” tab).**

**Important Note: Please do not indicate financials anywhere else in the online application form, please mark "n/a or 00", under the fee related questions in the online application form.**

**Without all the above 3 documents, your application will be considered incomplete and invalid and will not be considered further.**

- Any attempt to unduly influence UNICEF’s selection process will lead to automatic disqualification of the applicant.
- Joint applications of two or more individuals are not accepted.
- Please note, UNICEF does not charge any fee during any stage of the process.
- Women, trans, non-binary and gender diverse candidates meeting the requirements are strongly encouraged to apply.

- UNICEF is committed to diversity and inclusion and encourages qualified candidates from all backgrounds including persons living with disabilities to apply.
- General Terms and Conditions for the Consultancy Contract is attached, for your reference.
- Individuals engaged under a consultancy or individual contract will not be considered “staff members” under the Staff Regulations and Rules of the United Nations and UNICEF’s policies and procedures, and will not be entitled to benefits provided therein (such as leave entitlements and medical insurance coverage). Their conditions of service will be governed by their contract and the General Conditions of Contracts for the Services of Consultants and Individual Contractors. Consultants and individual contractors are responsible for determining their tax liabilities and for the payment of any taxes and/or duties, in accordance with local or other applicable laws.

**For any clarifications, please contact:**

UNICEF

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