

**ANNEX A: TERMS OF REFERENCE  
CANTO/RFP/PSP/2017/004/TMK  
FOR THE PROVISION OF TELEMARKETING SERVICES IN CANADA**

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to [galer@unhcr.org](mailto:galer@unhcr.org). The deadline for receipt of questions is **30<sup>th</sup> of October 23:59 EST 2017**.

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# 1 Introduction

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## 1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the Agency has helped tens of millions people to restart their lives. Today, UNHCR is one of the world's principal humanitarian Agencies. Its staff of more than 9,000 personnel is helping more than 55 million people in 125 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see <http://www.unhcr.org>.

UNHCR Canada is rapidly growing its fundraising program, with active acquisition programs for new monthly and one time donors. We have a file of approximately 15,000 active monthly donors and 35,000 single gift donors. In order to support our acquisition and retention efforts we are looking to increase the use of outbound telemarketing and affiliated services, from which we have historically seen positive return on investment. Telemarketing is to be used to convert warm leads to donors, to retain and upgrade monthly donors and to steward donors on our file. The office is now opening this RFP to recruit agencies to provide outbound telemarketing fundraising and affiliated services in Canada. For more information on UNHCR Canada, please see [www.unhcr.ca](http://www.unhcr.ca).

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## 1.2 Statement of Purpose & Objectives

UNHCR PSP Canada is currently looking to identify a competent external providers for the provision of outbound telemarketing services for donor recruitment and retention. The service provision will take place in Canada. Inbound calls will be handled in-house.

The contract phase is planned from January 2018 to December 2019 (two-years) and potentially extendable for a further period of one year (three year contract) subject to satisfactory performance. The successful bidders will be requested to maintain their quoted price model for the duration of the contract.

UNHCR PSP Canada is planning to have more than one vendor under the contract to have a main and a back-up service provider.

UNHCR expects the winner of this request for proposal (RFP) to be in a position to provide services from January 1st 2018 onwards.

Agencies are expected to provide the services as described under point 2 – requirements. The corresponding technical proposal needs to follow the structure of point 2- requirements.

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## 2 Requirements

**Please note:** these numbers are UNHCR Canada's estimations based on its annual plan for three years. The fundraising operation expects an approximately 25% market growth each year. Agencies are also requested to indicate in their bids their capacity and availability, as well as to give feedback on the expected percentages and KPI's in order to get a realistic indication, even if it is different from UNHCR's requirements. In addition, the agencies are also **required** to present their overall strategy for delivering their telemarketing services.

The primary service delivered will be telemarketing but UNCHR Canada employs a multi-channel discipline with all donor contacts. The agency is expected to be able to provide SMS services as well as affiliated mailing (pledge letters, non-contact mailing packages) in association with calling. These affiliated services can be carried out through third-partner agencies as long as the management is through the telemarketing agency.

Campaign	Details	Target	Estimated volumes + donors per year	Estimated outcomes (KPIs)
1. Welcome call new one time gift donors	-To thank and welcome new donors for their sign up, record any feedback from the donor, and verify and correct donor information	New OTG donors (within 4 weeks of gift) \$30-\$500 = 1. From online 2. From direct mail 3. From DRTV	4,000 per year, with 50% of volume in Q4  This is a best estimation then 25% expected market growth each year	1. Estimated 60% contact rate on the provided list by phone, 10% by SMS  2. Donor information is up-to-date in the database, missing information is collected  3. 5% targeted conversion to monthly donor
	-To test an invitation for new donors to join the monthly giving program at an appropriate level/for certain segments			
	-If donors cannot be reached after several attempts, and cellphone number is available, send out SMS	New Face to Face donors are excluded from this calling		
2. Welcome call new monthly donors	-To thank and welcome new donors for their sign up, record any feedback from the donor, and confirm donor information	New Monthly donors (at 4 month mark) \$1-\$50/month = 1. From online 2. From direct mail 3. From DRTV	2,500  This is a best estimation then 25% expected market growth each year	1. Estimated 60% contact rate on the provided list by phone, 10% by SMS  2. Donor information is up-to-date in the database, missing
	-To verify and correct personal and payment information including monthly donation transaction date			
	-If donors cannot be reached after several attempts, and cellphone number is available, send out SMS			

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		New Face to Face donors are excluded from this calling		information is collected
3. Monthly donor declines	-To remind monthly donors who have not been debited for several months due to failed or expired payment method. Verify personal and payment information in order to understand reason for interruption and reactivate donation.	1. Monthly donors with failed transactions > 4 months (Outflows from Face 2 Face, online and others)	1500  This is a best estimation then 25% expected market growth each year	1. Estimated 35% contact rate on the provided list by phone, 10% by SMS and 40% through mail  2. Estimated 50% targeted reactivation to monthly donor on phone, \$22/average gift  3. 1.25% targeted response rate through mail, \$22/average gift
	-If donors cannot be reached after several attempts, and cellphone number is available, send out SMS			
	If donors cannot be reached by phone or SMS, issue a mailing to verify personal and payment information and reactivate donation			
4. Monthly donor upgrade call	-To ask donors to increase their monthly gift amount.	Monthly donors at 13 month mark  Monthly donors > 13 months who have not been contacted for an upgrade in 6 months	3500  This is a best estimation then 25% expected market growth each year	1. Estimated 35% contact rate on the provided list by phone, 10% by SMS and 40% through mail  2. 30% targeted conversion to monthly donor on phone, \$8/average gift increase  3. 2% targeted response rate through mail, \$8/average gift increase
	-If not reached, try to call up to multiple times			
	-If still unreached, send out SMS			
	-If donors cannot be reached by phone or SMS, issue a mailing			
5. Monthly reactivation calls	-To convert long lapsed monthly donors to monthly donors	To convert from lapsed monthly donors > 12 month	1500	1. Estimated 30% contact rate by phone, 10% by

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		to active monthly donors	This is a best estimation then 25% expected market growth each year	SMS and 40% through mail  2. 12% conversion rate, \$20/month average gift
6. Conversions calls	-To convert one-off donors into monthly donors	Active and recently lapsed one-off donations	5000  This is a best estimation then 25% expected market growth each year	1. Estimated 35% contact rate on the provided list by phone, 10% by SMS and 40% through mail.  2. 4% positive conversions, \$22/month average gift
7. Acquisition calls	- To convert existing UNHCR Canada leads into one-off and/ or monthly donors - To acquire additional phone numbers through append	Text to give leads  Online leads (advocate, newsletter subscriber)	15,000 leads	1. Estimated 35% contact rate on the provided list by phone  2. 5.5% conversion rate, \$20/month average gift
8. Lead generation and acquisition calling	- To create a pool of convertible leads using online sources (social media, online pledges, third party networks) - To acquire phone numbers through lead generation activity and/or append -To call leads and convert to one-off and/or regular donors	Leads generated by TM agency or partner agency	12,000 leads  This is a best estimation then 25% expected market growth each year	1. Estimated 40% contact rate on the provided list  2. 8% conversion rate  3. \$22/month average gift  4. UNHCR expects to achieve the following minimal

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				cumulative Return on Investment (ROI) on acquisition programs:  Year 1: 0.7 Year 2: 1.5 Year 3: 2.2  5. Cost per lead \$1.50-\$6
9. Misc. calling/testing	Ad hoc campaigns for purposes of testing. At times may require urgent set-up and availability from telemarketing agents who are familiar with UNHCR and would have received new training on the emergency.  1. Emergency campaign outbound calls 2. Loyalty calls 3. Legacy acquisition calls	Outbound calls to selected segments, variable asks per campaign	1500  This is a best estimation then 25% expected market growth each year	1. KPIs to be defined per campaign

**Additional note:** Volumes indicated are our best estimates based on the knowledge we have to date and are subject to change. The schedule and number of campaigns and records provided may vary and are subject to UNHCR's confirmation. Volumes indicated may not represent the final volume of the program. The Expected Outcomes (KPIs) are also our best estimates based on the knowledge we have to date.

Each campaign will be defined to the awarded telemarketing agency through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

Please use Annex B for your financial proposal to indicate costs and your expected contact rates.

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## **2.1 Standard Service Requirements**

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In the **Technical Offer** please detail how your company can implement and satisfy the Standard Service requirements, which are as follows:

1. All agents need to be fluent in English or French. Language preference of donor to be provided with data files where available. Estimated 5% of file French speaking;

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2. Working hours 11:00-23.00 (Mon-Fri)<sup>1</sup>; and desired: 9:00-13:00 (Sat)\*;
3. Agents to record credit card and debit donations into UNHCR online donation form;
4. Preparation of export/import formatted forms including donor data (the form is provided by UNHCR). Secure transfer of forms to UNHCR or database service vendor (currently Deloitte);
5. Ability to handle monthly call capacity of UNHCR, taking into account some variance in seasonal forecasted fluctuations. Please define calling capacity: a) average of monthly calls able to manage, b) maximum volume of monthly calls able to manage;
6. Ability to issue SMS when donors cannot be reached by phone and cellphone data is available;
7. Ability to mail packages when donors request to make a pledge in the mail or if they cannot be reached on the phone. Ability to assist UNHCR with creation of mail packages for these purposes;
8. In conjunction with UNHCR Canada, development of high quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues;
9. Provision of all human relations activities related to staffing for UNHCR Canada's campaign including:
  - a. Plans and coordinates the recruitment of highly competent staff to effectively perform the activities as required under the UNHCR telemarketing program.
  - b. Provision of all staff administration, including but not limited to, employment contract, insurance coverage, remuneration, retirement benefits, and other benefits to staff members who have been recruited to support the telemarketing program. Agency must ensure employee benefits and compensation arrangements comply with the local legislation in Canada.
  - c. Monitors the attendance, performance and conduct of staff who are involved in the UNHCR telemarketing fundraising services.
  - d. Plans, develops and maintains motivation schemes as deemed appropriate;
  - e. Provision of an Account Manager(s) to serve as a focal point to oversee the effective implementation of the telemarketing program.

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## **2.2 Operation Management**

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Agencies are also required to include the following (if applicable) in their proposals:

1. The vendor is required to present their overall strategy for their telemarketing services.
2. The vendor is required to give access to call logs as requested to UNHCR with no additional charges. All call logs should be provided to UNHCR securely with all personal and financial information removed.

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<sup>1</sup> \* These hours may vary and are indicative. Shifts should be performed in relation to regular telemarketing hours in Canada.



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3. The vendor is expected to provide quality control and to explain how quality of outbound and telemarketing calls is done with front-lines telemarketers.
  - a. In addition, the vendor is also expected to describe their procedures regarding (donor) complaint management.
4. The vendor is required to propose the number of trainers, supervisors and front line telemarketers for this project to train their staff and to participate at the induction training provided by UNHCR Canada. The vendor is expected to provide a detailed description of the proposed model for this project (e.g.: dedicated team, full-time or part-time, shared work load, etc.), as part of this proposal and implement it accordingly. The vendor is required to provide trainings to its telemarketers and keep their knowledge up-to-date.
5. The vendor is expected to comply with personal data privacy laws and explain in their proposal how this is handled at the agency level.
  - a. The vendor is required to describe their procedures in terms of these privacy laws and their compliance with Canadian regulations (DNCL)
6. The vendor is also required to perform data analysis on its services provided, and to generate recommendations on how to improve services to increase contact rates and meeting KPIs. This includes:
  - a. Prepares and submits high-level weekly reports, a monthly tracker and detailed quarterly reports of telemarketing results;
  - b. Provide reports to measure key performance indicators (KPIs) including but not limited to decision maker contacts, number of contacts, conversion rate, average donation, and return on investment.
  - c. Provide input into data selection for campaign
  - d. Provides reports to analyze the performance of testing strategies, segmentation analysis and introduction of new measures;
  - e. Provides a verbal report of any misconduct or complaint received in regard to staff engaging in UNHCR's telemarketing activities as soon as practicable and a written report with actions taken and/or proposed remedy to UNHCR within 3 working days; and
  - f. Arrange quarterly face to face meetings with UNHCR

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### **2.3 Performance of Work**

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The appointed vendor is responsible to provide all supervision, equipment, labour and materials necessary to complete the work as described herein. The vendor shall supervise and complete the project using its best skill and attention. The vendor shall furnish management, supervision, coordination, labour and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of this Terms of Reference.

All services rendered by the vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

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The vendor shall conduct all its activities in strict confidence. The vendor shall handle and respect data privacy, if applicable, in a professional manner.

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## **2.4 Compliance with the Government Requirement**

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The vendor shall comply with all Canadian applicable laws, statutes, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the project.

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## **2.5 Other services**

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UNHCR Canada would like to have the below services and the corresponding pricing only for information. Please provide feedback if your agency can provide the below services. Please kindly note that the below listed items are **not mandatory** and will not be evaluated during the technical and financial evaluation.

- The corresponding prices are to be confirmed in Annex B (Financial Offer Form).
- Suppliers can provide pricing based on the indicated unit measure

### **Back Office Services:**

1. Phone number appends (per phone number)
2. Check and review general donors' data collected during phone calls (per check)
3. Any other service (please add rows for additional services you could provide and also indicate the unit measure)

### **Any Other Services:**

1. Any other service that can be beneficial to improve UNHCR Canada's telemarketing service

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### 3 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

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#### 3.1 Company Qualifications

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It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal):

- A description of your company with evidence of your company's capacity to perform the services required, including: company profile, registration certificate and last audit reports;
- Telemarketing experience in the business or the number of similar and successfully completed projects of telemarketing fundraising services;
- Number of similar projects currently, in Canada as well as elsewhere and their identities;
- Any relevant experience working with UNHCR Canada, other UN Agencies and NGOs should be included;
- Total number of existing clients, please provide a list;
- At least three letters of reference or client testimonials, with contact information; and
- Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

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#### 3.2 Proposed Services

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The technical proposal should follow all the requirements described under Requirements, in section 1.2 of this document.

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#### 3.3 Personnel Qualifications

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- The composition of the team you propose to provide;
- Curriculum Vitae of the core staff.

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#### 3.4 Vendor Registration Form

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If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C).

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#### 3.5 Applicable General Conditions

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Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) on the RFP Checklist Form (Annex F) and including it in your submitted Technical Proposal.

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**3.6 Special Data Protection Conditions**

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Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions by signing this document (Annex E) and including it in your submitted Technical proposal.

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**3.7 Content of Your Financial Proposal**

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Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown.

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## 4 Evaluation

### 4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

	Points obtainable
1. Company Qualifications (25%)	<ul style="list-style-type: none"> <li>General Liability/ Capacity of the Company (5%)</li> <li>Overall telemarketing fundraising experience/time in business (10%)</li> <li>Relevant experience in the non-profit sector (UNHCR, UN agencies, NGO etc.) (10%)</li> </ul>
2. Quality of Service (40%)	<ul style="list-style-type: none"> <li>Comprehensiveness of presented proposal (10%)</li> <li>Strategy of recruiting high quality donors, retaining and upgrading existing donors (15%)</li> <li>Capacity to achieve the UNHCR proposed results. Experience with similar projects and campaigns (15%)</li> </ul>
3. Project Staff (5%)	<ul style="list-style-type: none"> <li>Experience of core people who will work on UNHCR project. (Including experience with similar projects) (5%)</li> </ul>
<b>Total:</b>	<b>Maximum Total Score 70%</b>

Agencies will be asked to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via web/teleconference.

The minimum passing scores of the evaluation is 49 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

### 4.2 Financial Evaluation

The financial component is 30% of the total scores. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price.

The comparison will be based on UNHCR's requirements. No optional services will be included.

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## 5 Key Performance Indicators

### 5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis.

Campaign	Estimated outcomes (KPIs)
1. Welcome call new OTG donors	1. 60% contact rate on the provided list. 2. Donor information is up-to-date in the database, missing information is collected 3. 5% targeted conversion to monthly donor
2. Welcome call new monthly donors	1. 60% effective contact rate on the provided list. 2. Donor information is up-to-date in the database, missing information is collected.
3. Monthly Declines	1. 35% contact rate on the provided list 2. 50% targeted conversion to monthly donor on phone, \$22/average gift 3. 1.25% targeted response rate through mail, \$22/average gift
4. Monthly Upgrade call	1. 35% contact rate on the provided list 2. 30% targeted conversion to monthly donor on phone, \$8/average gift increase 3. 2% targeted response rate through mail, \$8/average gift increase
5. Monthly Reactivation calls	30% contact rate 12% conversion rate, \$20/month average gift

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6. Conversions calls	1. 35% contact rate on the provided list. 2. 4% positive conversions, \$22/month average gift
7. Acquisition calls	35% effective contact rate on the provided list  5.5% conversion rate, \$20/month average gift
8. Lead generation and acquisition calling	40% contact rate on the provided list  8% conversion rate  \$22/month average gift  UNHCR expects to achieve the following minimal cumulative Return on Investment (ROI) on acquisition programs:  12 month (cumulative): 0.7 24 month (cumulative): 1.5 36 month (cumulative): 2.2  Cost per lead \$1.50-\$6
9. Misc. calling/testing	KPIs to be defined per campaign

\* Contact rate can be defined as proportion of calls where caller was able to 'talk to the specific donor/decision maker and not i.e. leaving a message to a voicemail'.

Please note that budget allocation cannot be revealed by UNHCR at this point of time, but will be disclosed to the successful telemarketing Agencies.

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## 6 CUSTOMER RESPONSIBILITIES

UNHCR Canada will be responsible for;

- Appointing a dedicated project manager;
- Providing training about UNHCR's mission and activities for the telemarketing agents;
- Ensuring that the process of export/import of donor data between UNHCR's database and the vendor's database will go easily and efficiently;
- Providing input for content for the call scripts;
- Providing logos and materials;
- Providing input on images and materials used by the vendor;
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROI's to ensure high level results; and
  - (Bi) weekly meetings on progressions and deliverables of activities.