



# UNHCR

United Nations High Commissioner for Refugees  
Haut Commissariat des Nations Unies pour les réfugiés

**DATE: 23 OCTOBER 2017**

**REQUEST FOR PROPOSAL: No. CANTO/RFP/PSP/2017/004/TMK**

**FOR THE ESTABLISHMENT  
OF A FRAME AGREEMENT FOR THE PROVISION OF**

**TELEMARKETING SERVICES IN CANADA**

**CLOSING DATE AND TIME: 21<sup>ST</sup> OF NOVEMBER 2017 – 23:59 pm EST**

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## **INTRODUCTION TO UNHCR**

The Office of the United Nations High Commissioner for Refugees was established on 14 December 1950 by the United Nations General Assembly. The agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It also has a mandate to help stateless people.

In more than five decades, the agency has helped tens of millions of people restart their lives. Today, a staff of some 8,600 people in more than 125 countries continue to help more than 33.9 million globally displaced persons. To help and protect some of the world's most vulnerable people in so many places and types of environments, UNHCR must purchase goods and services worldwide. For further information on UNHCR, its mandate and operations, please see <http://www.unhcr.org>.

To learn more about UNHCR's work in Canada, please visit [www.unhcr.ca](http://www.unhcr.ca)

## **1. REQUIREMENTS**

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.

<b>IMPORTANT:</b> Terms of Reference (TORS) are detailed in Annex A of this document.
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It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Sub-Contracting: Please take careful note of article 5 of the attached General Terms and Conditions (Annex D).

Note: this document is not construed in any way as an offer to contract with your firm.

## **2. BIDDING INFORMATION:**

### **2.1. RFP DOCUMENTS**

The following annexes form an integral part of this Invitation to Bid:

Annex A:	Terms of Reference (TORs)
Annex B:	Financial Offer Form
Annex C:	Vendor Registration Form
Annex D:	UN General Conditions of Contracts for the Provision of Services (2010)
Annex E:	UNHCR Special Data Protection Conditions
Annex F:	RFP Checklist Form

### **2.2 ACKNOWLEDGMENT**

We would appreciate your informing us of the receipt of this RFP by return e-mail to Erzsebet Gal, [galer@unhcr.org](mailto:galer@unhcr.org) as to:

- Your confirmation of receipt of this invitation to bid
- Whether or not you will be submitting a bid

**IMPORTANT:** Failure to send the above requested information may result in disqualification of your offer from further evaluation.

### **2.3 REQUESTS FOR CLARIFICATION**

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal, PSP Administrative Associate, at [galer@unhcr.org](mailto:galer@unhcr.org). **The deadline for receipt of questions is on 30<sup>th</sup> of October 2017 23:59 p.m. EST.** Correspondence with any other UNHCR staff member or contractor in respect of this RFP is not permitted and may constitute grounds for disqualification. Bidders are requested to keep all questions concise.

**IMPORTANT:** Please note that Bid Submissions are **not** to be sent to the e-mail address above.

UNHCR will compile the questions received. UNHCR may, at its discretion, copy any reply to a particular question to all other invited bidders at once.

### **2.4 YOUR OFFER**

Your offer shall be prepared in English.

Please submit your offer using the Annexes provided. Offers not conforming to the requested formats may be not taken into consideration.

**IMPORTANT:** Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than the submission e-mail address will result in disqualification of the offer. Please send your bid directly to the address provided in the "Submission of Bid" section 2.6) of this RFP.

Your offer shall comprise the following two sets of documents:

- Technical offer
- Financial offer

#### **2.4.1 Content of the TECHNICAL OFFER**

**IMPORTANT:** No pricing information should be included in the **Technical Offer**. Failure to comply may risk disqualification. The technical offer should contain all information required.

The Terms of Reference (TORs) of the services requested by UNHCR can be found in **Annex A**. Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

##### **a) Description of the company and the company's qualifications**

- 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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##### **b) Understanding of the requirements for services, proposed approach, solutions, methodology and outputs**

Any comments or suggestions on the TOR, as well as your detailed description of the manner in which your company would respond to the TOR:

- A description of your organization's capacity to provide the service.
- A description of your organization's experience in these services.

##### **c) Proposed personnel to carry out the assignment**

- The composition of the team you propose to provide:
- Curriculum Vitae of core staff (team members).

##### **d) Vendor Registration Form:** If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (**Annex C**);

- e) 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.
- f) Please also indicate your acknowledgement of the **UNHCR Special Data Protection Conditions (Annex E)** by signing the document and including it in your submitted Technical Proposal.
- g) **RFP Checklist Form – Annex F** please submit the signed copy (checklist about the formal criteria of bidding)

#### **2.4.2 Content of the FINANCIAL OFFER**

Your separate **Financial Offer** must contain an overall offer in a single currency, which shall be Canadian Dollars (CAD).

The financial offer must cover all the services to be provided (price “all inclusive”).

The Financial Offer is to be submitted as per the Financial Offer Form (Annex B). Bids that have a different price structure may not be accepted.

Bidders should provide costs, as per Annex B, for each service.

The Price Component of your proposal should detail your fee structure for each activity listed above in the Technical Component, as well as other associated costs to deliver the required services.

Kindly note: Travel associated with visits to suppliers, contractors or UNHCR offices are the sole responsibility of the vendor.

UNHCR is exempt from all direct taxes and customs duties. With this regards, price has to be given without any taxes VAT, GST or HST.

You are requested to hold your offer valid for 90 days from the deadline for submission. UNHCR will make its best effort to select a company within this period. UNHCR’s standard payment terms are within 30 days after satisfactory implementation and receipt of documents in order.

The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

#### **2.5 BID EVALUATION:**

##### **2.5.1 Supplier Registration:**

The qualified supplier(s) will be added to the Vendor Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents. The investigation involves consideration of several factors such as:

- Financial standing;
- Core business;
- Track record;
- Contract capacity.

##### **2.5.2 Technical and Financial evaluation:**

For the award of this project, UNHCR has established evaluation criteria which govern the selection of offers received. Evaluation is made on a technical and financial basis. The percentage assigned to each component is determined in advance as follows:

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

	<b>Points obtainable</b>
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>

Remark: The Technical offer score will be calculated according to the percentage distribution for the technical and financial offers.

The **Financial offer** will use the following percentage distribution: **30%** from the total score.

The maximum number of points will be allotted to the lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., [total Price Component] x [CAD\$ lowest] \ [CAD\$ other] = points for other supplier's Price Component.

## 2.6 **SUBMISSION OF BID:**

The offers must bear your official letter head, clearly identifying your company.

Bids should be submitted by e-mail and all attachments should be in PDF format. (Copies of the PDF format documents may, as an addition, be included in Excel or other formats etc.).

The Technical and Financial offers shall be clearly separated.

**Bid must be sent by e-mail ONLY to: [DENCOBID@unhcr.org](mailto:DENCOBID@unhcr.org)**

**IMPORTANT:** The technical offer and financial offer are to be sent in separate documents. Failure to do so may result in disqualification.

**Deadline: 21<sup>st</sup> of November 2017, 23:59 p.m. EST**

**IMPORTANT:** Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

It is your responsibility to verify that all e-mails have been received properly before the deadline. Please be aware of the fact that the e-mail policy employed by UNHCR limits the size of attachments to a maximum of **5 MB**, so it may be necessary to send more than one e-mail for the whole submission, to send in a compressed file or to send a link to an online file storage modality.

Please indicate in e-mail subject field:

- Bid CANTO/RFP/PSP/2017/004/TMK
- Name of your firm with the title of the attachment
- If your email includes the technical or the financial offer (they are to be sent in separate emails)
- Number of e-mails that are sent (example: 1/3, 2/3, 3/3).

UNHCR will not be responsible for locating or securing any information that is not identified in the bid. Accordingly, to ensure that sufficient information is available, the bidder shall furnish, as part of the bid, any descriptive material such as extracts, descriptions, and other necessary information it deems would enhance the comprehension of its offer.

## **2.7 BID ACCEPTANCE:**

UNHCR reserves the right to accept the whole or part of your bid.

UNHCR may at its discretion increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the rate submitted. Any such increase or decrease in the contract duration would be negotiated with the successful bidder as part of the finalization of the Purchase Orders for Services.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs, as well as conforming to UNHCR's general principles, including economy and efficiency and best value for money.

## **2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS**

Any Purchase Order (PO) issued as a result of this RFP will be made in the currency of the winning offer(s). Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

## **2.9 UN GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES**

Please note that the General Conditions of Contracts for the Provision of Services (**Annex D**) will be strictly adhered to for the purpose of any future contract. The Bidder must confirm the acceptance of these terms and conditions in writing.

Yours faithfully,



Anu Surendran  
Senior PSP Officer, Americas