ANNEX A: TERMS OF REFERENCE
BRAZIL/RFP/PSP/2018/001/TMK
FOR THE PROVISION OF TELEMARKETING SERVICES FOR UNHCR PRIVATE SECTOR PARTNEHRSHIPS IN BRAZIL

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is the **21st of November 23:59 pm BRT.**

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1 Introduction

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 65 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 and http://www.acnur.org.br.

UNHCR has maintained an office in Brasilia since 1982. In 2014, the Private Sector Partnerships (PSP) program came into inception in Sao Paulo.

With seven full-time fundraisers, the Brazilian office is set to raise approximately BRL 5.5 million in 2018. The majority of revenue brought in to date has been generated through individuals via direct mail, telemarketing, and online initiatives.

We have a file of approximately 3,500 active monthly donors and 20,000 single gift donors.

1.2 Statement of Purpose & Objectives

UNHCR PSP Brazil is looking to partner with one or more competent external providers for the provision of inbound and outbound telemarketing services pertaining to Donor Development and Donor Acquisition programs. The service provision will take place in Brazil.

Bidders are invited to send proposal for the two areas listed below:

1) Donor Development
2) Donor Acquisition

Bidders can submit a proposal for donor development services or for donor acquisition services, or for both services. Please kindly note that is not mandatory to submit a proposal for both. The evaluation on technical and financial level will be carried out separately.

The evaluation of the above services will be carried out separately both on technical and financial levels.

The contract phase is planned for 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**. Based on the result, UNHCR PSP Brazil might appoint more than one service provider.

UNHCR expects the winners of this request for proposal (RFP) to be in a position to provide services from January 2019 onwards, until the end of 2021 (3-year contract).

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2 Requirements

Please note: these numbers are UNHCR Brazil'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 Brazil employs a multi-channel discipline with all donor contacts. The agency is expected to be able to provide SMS services as well as affiliated e-mailing 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.

Vendors are requested to prepare their technical proposal based on the requirements listed under point 2.1 and quote for the services on Annex B – Financial offer form.

2.1 Call services

2.1.1 Donor Development Campaigns

Campaign	Details	Target	Estimated volumes + donors per year	Expected 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 -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 One Time Giving donors (within 4 weeks of gift) = 1. From online 2. From direct mail 3. From DRTV	1. From online: 2,000 per year, 50% growth YoY/ 2. From direct mail: 24,000 to 36,000 3. From DRTV: 800, 100% growth YoY	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
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= 1. From online	4,400/year This is a best estimation then	1. Estimated 60% contact rate on the provided

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	-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	2. From direct mail 3. From DRTV	100% expected market growth each year	list by phone, 10% by SMS 2. Donor information is up-to-date in the database, missing information is collected
3. 0800/donor care	- Pick up inbound calls from donors and prospects with different queries - Handle donor queries such as upgrades, changes in payment method, etc - Proactive call to change payment method for donors who have soon-to-expire credit cards. - Objection handle for donors who want to cancel their monthly donations - Send out e-mails with donor queries/other communications when applicable. - Treat and Reply to donor care e-mails	Existing donors and prospects	1. 2.000 inbound calls/year 2. 2.000 email replys/ year	3. Handle cancelations with a 30% success rate for maintaining donors donations 4. Handle cancelations with 20% for donors who cancel but give an extra one off gift 5. 50% contact rate for soon-to-expire credit card calls calls, with a 50% success rate in renewing payment methods

2.1.2 Acquisition Campaigns

Campaign	Details	Target	Estimated volumes + donors per year	Expected outcomes (KPIs)
1. 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	1. Monthly donors with failed transactions> 4 months	1600/year This is a best estimation then 25% expected growth each year	1. Estimated 50% contact rate on the provided list by phone, 10% by SMS

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	interruption and reactivate donation. -If donors cannot be reached after several attempts, and cellphone number is available, send out SMS			2. Estimated 15% conversion rate, R$50/average gift
2. Monthly donor upgrade call	-To ask donors to increase their monthly gift amount. -If not reached, try to call up to multiple times -If still unreached, send out SMS	Monthly donors at 4-month mark (timing might be adjusted freely) Monthly donors > who have been acquired 4 months ago.	4500/year This is a best estimation then 100% expected market growth each year	1. Estimated 60% contact rate on the provided list by phone, 10% by SMS 2. 27% conversion rate, 30% average gift increase
3. Monthly reactivation calls	-To convert long lapsed monthly donors to monthly donors	To convert from lapsed monthly donors > 12 month to active monthly donors	2600 This is a best estimation then 40% expected market growth each year	1. Estimated 45% contact rate by phone, 10% by SMS 2. 11% conversion rate, R$50/month average gift
4. Conversions calls	-To convert existing one-off donors into monthly donors	Active and recently lapsed one-off donations	1. From online: 2,000 per year, 50% growth YoY/ 2. From direct mail: 24,000 to 36,000 3. From DRTV: 800, 100% growth YoY	1. Estimated 30% contact rate on the provided list by phone, 10% by SMS 2. 6%positive conversions, $40/month average gift
5. Lead generation call-conversion to donors	- To convert existing UNHCR Brazil leads into one-off and/ or monthly donors - To acquire additional phone numbers through append	Leads generated by online activities, newsletter subscriber, events)	6,600 leads/year, 20% growth per year	1. Estimated 50% contact rate on the provided list by phone

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	-if prospects cannot be reached after several attempts, send out SMS and automated e-mail through agency's system for conversion			2. 7% conversion rate, R$45/month average gift, R$ 60/one-off gift
6. 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	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'. Bidders are requested to submit their realistic and valid effective contact rate expressed in %, even it is higher or lower than UNHCR KPI in their technical proposal.**

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. We encourage the submission of proposals that have different KPIs of the listed above since they are aligned with the possibilities of the current operation and history of the supplier. However, it should be specified the strategies that will be in place to achieve the rates suggested in this ToR.
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 proposals to indicate costs.

2.2 Standard Service Requirements

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 Portuguese;

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2. Working hours 09:00-21.00 (Mon-Fri)[1]; and desired: 9:00-13:00 (Sat)*;
3. Agents to record credit card and debit donations into UNHCR online form;
4. Ability to download lead information from lead generation platform(s) and upload information into agency's dialing system.
5. 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;
6. 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;
7. Ability to issue SMS when donors cannot be reached by phone and cellphone data is available;
8. Ability to email when donors cannot be reached on the phone.
9. In conjunction with UNHCR Brazil, development of high quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues;
10. Toll-Free number (0800) subcontract and set up, including all back office and IT support needed to receive inbound calls; Provision of all human relations activities related to staffing for UNHCR Brazil'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 Brazil.
    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.
    f. Provision of the sufficient number of PA (posição de atendimento / position of service): service station or workstation is the set consisting of software, hardware and furniture where the operator works. Call Center PA is to ensure that service can happen in the right way and as productive as possible. In addition, such space is required in order to guarantee the appropriate working conditions, being employed in internal or outsourced call centers.

2.3 Operation Management

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

[1] These hours may vary and are indicative. Shifts should be performed in relation to regular telemarketing hours in Brazil.

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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.
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 Brazil. 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 Brazilian regulations
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 monthly face to face meetings with UNHCR to discuss KPIs and optimizations
7. The vendor is required to recommend and hire lead generation vendors, liaising all contracts with UNHCR staff prior to finalizing any new contracts.

2.4 Performance of Work

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

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

2.5 Compliance with the Government Requirement

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

2.6 Other services

UNHCR Brazil 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. Data enrichment, cleaning and list management
3. Check and review general donors' data collected during phone calls (per check)
4. 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 Brazil'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.

Bidders can submit a proposal for donor development services or for donor acquisition services, or for both services. Please kindly note that is not mandatory to submit a proposal for both. The evaluation on technical and financial level will be carried out separately.

UNHCR official language is English. If possible, please submit your technical proposal in both English and in Portuguese. In case you submit a proposal only in Portuguese, it will be translated during the evaluation.

3.1 Company Qualifications

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score your company`s *(1) general liability*, *(2) telemarketing experience in the private and (3) non-profit sector* based *feedbacks received from clients and the number of projects*:

- A description of your company with evidence of your company's capacity to perform the services required, including: company profile, registration certificate and State and Municipal Fiscal Subscription (inscrição estadual e municipal)[2]. These documents are mandatory to establish compliance with the criteria.
- Telemarketing experience in the private sector.
- Telemarketing experience working with non-profit organizations, including the number of projects (currently underway or successfully completed in total)
- Total number of existing clients, providing the list of references with contact information, UNHCR PSP Brazil will contact for feedbacks, is mandatory*.
- Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

**UNHCR reserves the right to contact any reference listed and other relevant company or organization to ask for references and additional information*

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score *(1) the comprehensiveness of the proposal; (2) your company`s compliance regarding the required services listed under point 2; (3) your company`s capacity and strategy to provide the required services;*

2 UNHCR handles all bidding documents strictly confidential during the tendering process. Please refer to UNHCR General Conditions of Contracts, clause 13.

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- The comprehensiveness of the proposal, whether the proposal follows the structure of this ToR.
- The provision of services listed under section 2 (call services, standard service requirements and operation management)
- A description of your organization's capacity and strategy to provide the service in the ToRs and achieve the estimated results.

3.3 Personnel Qualifications

Description of the composition of your team to be dedicated to UNHCR account, including their relevant experience in telemarketing. Please also provide Curriculum Vitae of the core staff to work on the UNHCR account and quantify the number of years` of direct relevant experience.

3.4 Vendor Registration Form

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

3.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) and include it in your submitted Technical Proposal.

3.6 Special Data Protection Conditions

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.

3.7 Content of Your Financial Proposal

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

Prices filled in the financial offer for Donor Development and Donor Acquisition form must include all related costs (i.e. inbound set up costs) in it.

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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 separately for donor development and for donor acquisition services: 70% from the total score (on a 100 points scale, i.e. max 70 points obtainable for the technical offer). Please find below the detailed scoring breakdown:

4.1.1 Donor development

	Points obtainable
1. Company Qualifications (25)	• General Liability/ Capacity of the Company (5) • Telemarketing experience in the private sector (10)[3] • Telemarketing experience in the non-profit sector (10)[4]
2. Quality of Service (40)	• Comprehensiveness of presented proposal (5) • Strategy of retaining and upgrading existing donors and capacity to achieve the estimated results based on services listed under 2.1.1 – call services (15) • Compliance with the service required under 2.2 – standard service requirements (10) • Compliance with the service required under 2.3 – operation management (10)
3. Project Staff (5)	• Experience of core people who will work on UNHCR project. (Including experience with similar projects) (5)[5]
Total:	**Maximum Total Score 70%**

Agencies might be asked to deliver a presentation on their proposal via web/teleconference. In case of this is required, bidders will be informed on due time.

The minimum passing scores of the evaluation is 42 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.

3 The scores will be allocated for the number satisfactory references received from telemarketing clients in the private sector, based on the evidence provided

4 The scores will be allocated for the number of relevant telemarketing projects in the non-profit sector, based on the evidence provided (in total including projects underway and successfully completed).

5 The scores will be allocated based on the average years of experience of the dedicated team members in telemarketing.

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4.1.2 Donor acquisition

	Points obtainable
1. Company Qualifications (25)	• General Liability/ Capacity of the Company (5) • Telemarketing experience in the private sector (10)[6] • Telemarketing experience in the non-profit sector (10)[7]
2. Quality of Service (40)	• Comprehensiveness of presented proposal (5) • Strategy of hiring donors and capacity to achieve the estimated results based on services listed under 2.1.2 – call services (15) • Compliance with the service required under 2.2 – standard service requirements (10) • Compliance with the service required under 2.3 – operation management (10)
3. Project Staff (5)	• Experience of core people who will work on UNHCR project. (Including experience with similar projects) (5)[8]
Total:	**Maximum Total Score 70%**

Agencies might be asked to deliver a presentation on their proposal via web/teleconference. In case of this is required, bidders will be informed on due time.

The minimum passing scores of the evaluation is 42 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 evaluation for donor development services and for donor acquisition services will be carried out separately.
The maximum number of points (30) will be allotted to the lowest price offer 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 [BRL lowest] / [BRL other] = points for other supplier's Price Component.

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

6 The scores will be allocated for the number satisfactory references received from telemarketing clients in the private sector, based on the evidence provided
7 The scores will be allocated for the number of relevant telemarketing projects in the non-profit sector, based on the evidence provided
8 The scores will be allocated based on the average years of experience of the dedicated team members in telemarketing.

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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. These are the expected results. Contract maintenance depends on the results agreed in contract:

1. Welcome call new one time gift donors

- Estimated 60% contact rate on the provided list by phone, 10% by SMS
- Donor information is up-to-date in the database, missing information is collected
- 5% targeted conversion to monthly donor

2. Welcome call new monthly donors

- Estimated 60% contact rate on the provided list by phone, 10% by SMS
- Donor information is up-to-date in the database, missing information is collected

3. 0800/donor care

- Handle cancelations with a 30% success rate for maintaining donors donations
- Handle cancelations with 20% for donors who cancel but give an extra one off gift
  50% contact rate for soon-to-expire credit card calls calls, with a 50% success rate in renewing payment methods

4. Monthly donor declines

- Estimated 50% contact rate on the provided list by phone, 10% by SMS
-
- Estimated 15% conversion rate, R$50/average gift

5. Monthly donor upgrade call

- Estimated 60% contact rate on the provided list by phone, 10% by SMS
-
- 27% conversion rate, 30% average gift increase

6. Monthly reactivation calls

- Estimated 45% contact rate by phone, 10% by SMS
- 11% conversion rate, R$50/month average gift

7. Conversions calls

- Estimated 30% contact rate on the provided list by phone, 10% by SMS
- 6% positive conversions, $40/month average gift

8. Lead generation call- conversion to donors

- Estimated 50% contact rate on the provided list by phone
- 7% conversion rate, R$45/month average gift, R$ 60/one-off gift

9. Misc. calling/testing

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- KPIs to be defined per campaign

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 Brazil 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.