



**Annex A: Terms of Reference
PHILIPPINES/RFP/PSP/2019/003
FOR THE PROVISION OF TELEMARKETING SERVICES IN THE PHILIPPINES**

In case you have any question or request for clarification regarding this documents, please contact Erzsebet Gal (galer@unhcr.org) by the 4th of March 2019, 23:59 pm PHT.

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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 of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Its staff of more than 16,700 personnel is helping more than 68 million people in 138 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.unhcr.org/ph>.

UNHCR Philippines would like to invite agencies to put forward proposals to provide services for Telemarketing, with a specific focus on donor acquisition and supporter engagement.

For nearly three years now, UNHCR Philippines has implemented an always-on digital fundraising and lead generation campaign. Telemarketing has been one of our critical tools in building a relationship with our supporter base, in converting warm leads to donors, and in generating critically needed funds to support our humanitarian work for displaced persons in the Philippines and refugees across the world.

We are rapidly growing our fundraising program in 2019, and in order to support our acquisition efforts, we are looking to institutionalize the use of outbound telemarketing through a service-provider.

1.2 Statement of Purpose & Objectives

The Private Sector Partnerships (PSP) unit of UNHCR Philippines is opening this Request for Proposal to recruit qualified agency/ies that will provide outbound telemarketing fundraising services in the Philippines.

The contract phase is planned from April 2019 to December 2019 (9 months), and potentially extendable for a further period of two years (24 months) subject to satisfactory performance. The successful contractor is requested to maintain their quoted price model for the duration of the contract.

The selected agency is required to manage and implement telemarketing for donor acquisition to help achieve the following objectives.

- Phase I : April 2019 to December 2019 (9 months) – 600 regular giving donors converted
- Phase II : January to December 2020 (12 months) – 720 regular giving donors converted
- Phase III : January to December 2021 (12 months) – 865 regular giving donors converted
- 30-40% pf effective contact rate
- Minimum 8% of conversion rate
- Meet annual budget targets and required ROI criteria as listed under 5.1

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Any adjustment on the number of target donors to be acquired shall be mutually agreed by UNHCR and the Contractor prior to the execution of the contractual service agreement and subject to revision weekly during all contract duration.

Please note: These numbers are UNHCR Philippines' estimations based on its annual plan for three years. The fundraising operation expects an approximately 20% market growth each year. Agencies are also requested to indicate in their bids **their maximum 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.

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2 Requirements

2.1 Core Telemarketing Fundraising Services

The following are the services required of the contractor. **Please use Annex B for your financial proposals to indicate costs.**

Service Requirement	Details	Target	Expected volumes for project duration	Expected outcomes (KPIs)
Acquisition calls	- To convert new leads into monthly giving donors	Text to give leads Online leads (advocate, newsletter subscriber)	Phase I = 21500 Leads Phase II = 25800 Leads Phase III = 25800 Leads	Contact Rate = 30% Conversion Rate = 8% Average gifts = PHP600/month
Affiliate telemarketing, ad hoc services	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. Thematic campaigns (Syria anniversary, Philippines campaign)	Outbound calls to targeted segments, variable asks per campaign	KPIs to be defined per campaign	KPIs to be defined per campaign

Please refer to **Annex F** for the monthly computations on the targets.

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 Terms of Reference.

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

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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 English and Filipino. Language preference is English.
2. Working hours 10:00-18:00 (Mon-Fri); and if needed: 10:00-14:00 (Sat).
3. Agents to record credit card and debit donations, and prepare export/import formatted forms including donor data (the form is provided by UNHCR). Secure transfer of forms to UNHCR or database service provider via Safe File Transfer Protocol (SFTP).
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 leads cannot be reached by phone and cellphone data is available;
7. In conjunction with UNHCR Philippines, agency to develop high quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues;
8. Provision of all human relations activities related to staffing for UNHCR Philippines' campaign including:
 - a. Planning and coordinating 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 the Philippines.
 - c. Monitoring of the attendance, performance and conduct of staff who are involved in the UNHCR telemarketing fundraising services.
 - d. Planning, development, and maintenance of 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.

2.3 Operations Management

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.
3. The vendor is expected to provide quality control and to explain how quality of outbound and telemarketing calls is done with front-line telemarketers.
 - a. In addition, the vendor is also expected to describe their procedures regarding complaint management.

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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 Philippines. 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 UNHCR Data Privacy provisions and Philippine data privacy 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. Preparing and submitting high-level weekly reports, a monthly tracker and detailed quarterly reports of telemarketing results;

b. Providing 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. Providing input into data selection for campaign

d. Providing reports to analyze the performance of testing strategies, segmentation analysis and introduction of new measures;

e. Providing 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. Arranging quarterly face to face meetings with UNHCR

2.4 UNHCR Responsibilities

UNHCR is responsible for:

- Working with the selected agency to develop a full project brief.
- Preparing a periodic/quarterly Statement of Work (SOW) to specify project requirements and timelines, and budgets.
- Providing training about UNHCR's operations 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, efficiently, and securely.
- Providing input for content for the call scripts.
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROI's to ensure high level results.
- Streamlining reports submitted by the agency with UNHCR database reports and letting agency know of any required adjustment to reported figures.
- Arranging regular meetings on progressions and deliverables of activities.

UNHCR Assets

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During project onboarding, UNHCR will share the following assets to the selected contractor:

- Brand Book
- Communicating How UNHCR Protects
- Brand Awareness Survey – Results
- 2019 Communications Calendar
- Samples of local and global campaign assets on digital fundraising, lead generation, email marketing
- Best-performing scripts from other UNHCR fundraising offices

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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:

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 and capacity of the company, (2) telemarketing fundraising experience in the private (for profit) sector (3) relevant experience in the non-profit sector.*

It is considered essential to include the following information into your technical proposal and to submit the listed documents to establish compliance with the requirements:

- A description of your company with evidence of your company's capacity to perform the services required, including: company profile, registration certificate, audit reports over the last 3 years.¹
- Please specify location of the company's headquarters, and the branches that will be involved in the project.
- Telemarketing experience in the private (for profit) sector.
- Telephone fundraising experience in the non-profit sector.
- Please provide at least three client references that we will contact during evaluation.
- Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

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.*

- The comprehensiveness of the proposal, please make sure that your proposal follows the structure of this ToR and address all requirements clearly to ease the scoring.
- 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. Including sample reporting flows and schedules.

3.3 Personnel Qualifications

Experience of core people who will work on UNHCR project, including experience with similar projects.

¹ 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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Please also provide a brief Curriculum Vitae of the core staff to work on the project. The number of years of relevant experience will be scored during the technical evaluation.

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 by signing this document (Annex D) and including it in your submitted Technical Proposal.

Please also 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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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 (on a 100 points scale, i.e. max 70 points obtainable for the technical offer).

Please find hereunder the detailed scoring breakdown:

	Points obtainable
1. Company Qualifications (25)	<ul style="list-style-type: none"> General Liability/ Capacity of the Company (5)² Telemarketing experience in the private sector (7.5)³ Telemarketing experience in the non-profit sector (7.5)⁴ Reference from clients (5)⁵
2. Quality of Service (35)	<ul style="list-style-type: none"> The comprehensiveness of the proposal, please make sure that your proposal follows the structure of this ToR and address all requirements clearly to ease the scoring (5) The provision of services listed under Section 2 (call services, standard service requirements and operation management) (15) A description of your organization's capacity and strategy to provide the service in the ToR and achieve the estimated results. Including sample reporting flows and schedules (15)
3. Project Staff (10)	<ul style="list-style-type: none"> Experience of core people who will work on UNHCR project. (Including experience with similar projects) (10)⁶
Total:	Maximum Total Score 70%

The minimum passing scores of the evaluation is 40 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 offer will use the following percentage distribution: 30% from the total score.

The maximum number of points (30) will be allotted to the lowest total price calculated based on the prices offered on **Annex B**. All other offers will receive points in inverse proportion to the lowest price.

²Please include: company profile, registration certificate, audit reports over the last 3 years.

³The scores will be allocated for the number of relevant years` of experience in the private sector (i.e. for profit sector), based on the evidence provided.

⁴ The scores will be allocated for the number of relevant years` of experience in the non-profit sector, based on the evidence provided.

⁵ Please provide at least three client references that we will contact during evaluation.

⁶ The scores will be allocated based on the average years` of experience of the core staff dedicated to UNHCR account

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Please present your financial offer based on the services listed under Section 2 on Annex B. Only Annex B can be used for financial proposals. The evaluation will be based on the total cost of services listed.

Payment Method

UNHCR shall pay the vendor(s) within 30 days after satisfied completion of each service requested. Payment shall be made against invoice and based on the quotation submitted by the vendor(s).

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5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier.

Campaign	Expected outcomes (KPIs)
1. Welcome call – New Leads	1. Minimum of 30% effective contact rate on the provided list. 2. Minimum of 8% targeted conversion to monthly donor
2. Average Gifts	Phase 1: PHP 600 average gift for monthly donors Phases 2 and 3 PHP 700 average gift for monthly donors
3. Operations and maintenance	Leads' and converted donors' information are up-to-date in the database
4. ROI	UNHCR expects to achieve a 1.0 minimum Return on Investment (ROI) on this donor acquisition program.
9. Misc. calling/testing	KPIs to be defined per campaign

*Effective contact rate can be defined as 'talking to the specific donor and not i.e. leaving a message to a voicemail'.