

**ANNEX A: TERMS OF REFERENCE  
RFQ/PSP/2021/SOUTHAFRICA/01  
REQUEST FOR QUOTATION  
FOR THE PROVISION OF OUTBOUND TELEMARKETING SERVICES IN SOUTH AFRICA**

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# 1. Introduction

## 1.1 Background

The office of the United Nations High Commissioner for Refugees (UNHCR) was created in 1950, during the aftermath of the Second World War, to help millions of Europeans who had fled or lost their homes. We had three years to complete our work and then disband.

Since then, the 1951 Refugee Convention has been strengthened by additional regional legal instruments. Today, almost 70 years later, our organization is still hard at work, protecting and assisting refugees and internally displaced (IDPs) around the world. In almost seven 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 17,000 personnel is helping more than 79 million people in 135 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>

## 1.2 Private Sector Partnership Service (PSP) in Africa

The primary purpose of the UNHCR Private Sector Partnership Service (PSP) in Africa is to generate income from individual donors, corporates, and foundations, to support UNHCR activities worldwide. PSP activities in Africa include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Partnerships and Philanthropy (PPH) seeking support from companies, foundations, and High Net-Worth individuals.

UNHCR Africa is rapidly growing its fundraising program, with active acquisition programs for new monthly and one-time donors. To support our acquisition and retention efforts we are looking to utilize outbound telemarketing and affiliated services, from which the organisation has historically seen positive return on investment.

## 1.3 Statement of Purpose & Objectives

The purpose of the present solicitation is identifying **qualified telemarketing** service providers to support PSP South Africa in the recruitment and retention of new donors. PSP South Africa might appoint two service providers for simultaneous working arrangements for market testing purposes.

The contract phase is planned tentatively from July 2021 to 31 Dec 2021. The successful bidders will be requested to maintain their quoted price model for the duration of the contract.

## 2. Requirements

**Please note:** these numbers are UNHCR PSP South Africa’s estimations based on its annual plan for three years. The fundraising operation expects approximately 25% 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 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 lead generation and telemarketing.

| Campaign             | Details  | Expected Volumes + Donors per year   | Expected (KPI’s)  | Outcomes |
|----------------------|--|--|---|----------|
| 1. Lead Generation   | Vendor (telemarketing agency) will be responsible for generating convertible leads- this could be done in-house or sub-contracted to a third party using sources such as social media, online pledges or third party networks. | 9000 leads for the duration of the contract.<br>Estimate of 1500 leads to be generated per month | 40% effective contact rate on the provided list<br><br>7% conversion rate   |          |
| 2. Acquisition calls | Convert leads into one off and regular donors  | Min. 630 donors signed up for the six month duration   | 7% conversion rate from the leads generated<br><br>80% of acquired donors should be regular monthly donors.<br>20% of donors acquired should be one-off donors.<br><br>ZAR150/month minimum average donation<br>ZAR800 Average minimum One-off donation |          |

|                          |  |  |   |
|--------------------------|--|--|---|
|                          |  |  |   |
| 3. Conversion calls      | To convert one-off and/or inactive donors into monthly donors  | 25% of one-off donors on database and/or 25% of inactive donors as provided by UNHCR. Specific numbers will vary based on the growth of UNHCR's donor database in South Africa.<br><br>This is a best estimation | 25% of one-off donors on database and/or 25% of inactive donors as provided by UNHCR. Specific numbers will vary based on the growth of ZAR150/month minimum gift |
| 4. Misc. calling/testing | Ad hoc campaigns for purposes of testing. At times may require urgent set-up and availability from telemarketers who are familiar with UNHCR and would have received new training on the emergency.<br><br>1. Emergency campaign outbound calls<br><br>Outbound calls to selected segments, variable asks per campaign | Number of donors recruited will form part of the monthly acquisition targets listed as item 2 in this table<br><br>This is a best estimation   | KPIs to be defined per campaign   |

**Additional note:** The schedule and number of campaigns and records provided may vary and is subject to UNHCR's confirmation.

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).

## 2.1 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 telemarketers need to be fluent in English. Language preference of donor to be provided with data files where available.
2. Working hours 9:00-18:00 (Mon-Fri); and desired: 9:00-13:00 (Sat);
3. Telemarketers to record credit card and debit donations into UNHCR telemarketing e-mandate;
4. Preparation of export/import formatted forms including donor data (the form is provided by UNHCR). Secure transfer of forms to UNHCR.
5. Ability to handle monthly call capacity of UNHCR, considering 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. In conjunction with UNHCR, development of 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'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 South Africa.

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.

## 2.2 Operation 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 will be required to arrange pre-scheduled and/or random (upon request) sessions where UNHCR is able to listen in on telemarketing calls for quality analysis purposes.
4. The dedicated UNHCR Account manager will be required to convene with UNHCR at least once a week for monitoring, evaluation, planning and ad-hoc reasons.
5. The vendor will be required to arrange pre-scheduled meetings with UNHCR and the front-line telemarketers. These meetings should occur at a minimum of once a month as well as on an ad-hoc basis with a minimum of a 3-day notice period.
6. 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 (donor) complaint management.
7. 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 South Africa. 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 workload, 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.
8. The recruitment of, management and training of front-line telemarketers will be at the cost of the vendor.
9. 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 South African regulations (POPIA)
10. 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 regarding 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

### 2.3 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 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.

## 3. Content of the offer and evaluation

Please make sure that you submit the necessary information in your technical proposal to establish compliance with the below eligibility criteria. There is no set format to present your

proposal, it can be a pdf, word, power point presentation etc. Please note that general company profile will be NOT be accepted.

The evaluation will be based on a pass/fail (Yes or No) method. Your proposal must be in English and compliant with **all** the below listed criteria to be considered:

| <b>Criteria (pass or fail)</b>  | <b>Documents, information to be provided to establish compliance with the set criteria</b>   |
|---|--|
| The vendor shall comply with all South African 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. | Company certificate issued by an institutional body, such as registration certificate, accepted in South Africa. <b>The certificate is to be sent along with the technical proposal.</b> |
| POPIA compliance  | Information included into the technical proposal on POPIA compliance.  |
| Training availability   | Information to be included in the technical proposal on training frequency (weekly, monthly etc.)  |
| Statistics and KPIs provision, including real time quality assessment   | Information included into the technical proposal on the statistics and reports to keep track on KPIs.  |
| Business continuity plan provided   | Information included into the technical proposal.  |
| Export File provision   | Confirmation included into the technical proposal that this file will be provided to PSP South Africa on a regular basis.  |
| Minimum working hours provided  | Information included into the technical proposal as per requirements listed under section 2.   |
| Ability to scale up and start as per dates indicated.   | Confirmation included into the technical proposal.   |
| List of clients.  | List is included into the technical proposal.  |

Please fill in Annex B for your price proposal. Your financial proposal must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection. UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes. Please use a single currency (ZAR) to provide your quotation.

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

**The contract will be awarded to the technically compliant, lowest price proposals.**

### 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) by signing each page. Please send it back with your technical offer.

### 3.6 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) by signing each page. Please send it back with your technical offer.

## 4. Customer Responsibilities

UNHCR PSP South Africa will be responsible for;

- Appointing a dedicated project manager;
- Providing training about UNHCR's mission and activities for the telemarketers;
- 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;
- 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.

## 5. Contact information and bid submission

The offers are to be submitted via UNHCR online bidding system, called eTenderBox. Please read Annex F & G for registration. Your quotation must be valid as least for 30 days. You need a valid email address and a password to access the tender to upload your bids.

<http://etenderbox.unhcr.org>

Please look for reference RFQ/PSP/2021/SOUTHAFRICA/01 in the eTenderBox to upload your bids into the right folders.

The deadline to receive your proposal is: 5<sup>th</sup> of July 2021 23:59 pm (Time zone in Pretoria, South Africa (GMT+2))

For any question please contact Ms. Erzsebet Gal at [galer@unhcr.org](mailto:galer@unhcr.org)