

ANNEX A: TERMS OF REFERENCE
RFP/23/020/NETHERLANDS/PSP

Request for proposal for outbound telemarketing services for UNHCR Private Sector
Partnerships in the Netherlands

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 **19th of April 2023 via email**.

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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, 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 18,000 personnel is helping more than 89 million people in 137 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>.

1.1.1 Private Sector Partnership Service (PSP) in the Netherlands

The primary purpose of the UNHCR Private Sector Partnership Service (PSP) in the Netherlands is to generate income from individual donors, corporates and foundations, in order to support UNHCR activities worldwide. PSP activities in the Netherlands 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 Netherlands is rapidly growing its fundraising program, with active acquisition programs for new monthly and one-time donors. We have a file of approximately 37,000 active monthly donors and 28,000 single gift donors by the end of 2022. 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.

1.2 Statement of Purpose & Objectives

The UNHCR PSP team in the Netherlands is currently looking to identify a competent in-country external providers for the provision of outbound telemarketing services for two (2) years plus one (1) year extension upon satisfactory performance, tentatively from May:

- Phase 1 - 1st of May 2023 until end of April 2024
- Phase 2 - 1st of May 2024 – end of April 2025
- Phase 3 - 1st of May 2025 – end of April 2026

PSP Netherlands would like to identify qualified companies based on the following two sets of services:

1. Lot 1: Conversion, upgrades, reactivation and emergency calls
2. Lot 2: F2F verification calls (welcome calls)

Companies can submit a proposal for each lot (Lot 1 and Lot 2), with a separate proposal per lot. It is not mandatory to send an offer for all services. The evaluation of the different lots will be carried out separately. Please make sure that all requirements per lot are included in your proposal. Please also clearly indicate the services/lots you are bidding on to ease the evaluation process.

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Supplier(s) will be requested to maintain their proposed pricing structure for the duration of the contract. PSP Netherlands aims at awarding multiple service providers to ensure business continuity and for the purpose of benchmarking.

PSP Netherlands might appoint two service providers (a primary and a back-up) per lot to set-up the telemarketing program in a more sustainable way, for the different campaigns.

1.2.1 Objectives and volume for outbound campaigns

UNHCR estimated volume (donors to be called):

Outbound Program	Phase 1	Phase 2	Phase 3
Conversions calls (One off donors)	6,000	6,600	7,260
Upgrade calls	15,000	16,500	18,150
Reactivation calls	10,000	13,250	16,900
Emergency campaign outbound calls	10,000	11,000	12,100
F2F verification calls (welcome calls)	2,000	5,000	5,000

The call volumes indicated are our best estimates based on the knowledge we have to date and are subject to change. The number of calls may vary and are subject to UNHCR's confirmation.

Expected outcome:

Campaign	Expected outcomes (KPIs)
1. Conversion call	1. 55-65% effective contact rate on the provided list. 2. 15% positive conversions. 3. Average gift €11 per month
2. Upgrade call Regular donors	1. Minimum 50% effective contact rate of the list provided. 2. 25-30% of donors upgrade their gift. 3. Overall average gift increase is 35-45%.
3. Reactivation call	1. Minimum 50% effective contact rate of the list provided. 2. 10% of lapsed donors converted 3. Overall average value of €120 per donor
4. Emergency campaign outbound calls	1. Up and running within 24-48 hours after green light received from UNHCR 2. Minimum 55% effective contact rate of the list provided. 3. 15% donates to UNHCR
5. F2F verification calls (welcome calls)	1. Minimum 75% effective contact rate of the list provided.

Please note: the below numbers are UNHCR PSP Netherlands' estimations based on its annual plan for three years. The fundraising operation expects an 10-25% 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 in order to get a realistic indication, even if these differ 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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1.3 Pre-selection criteria (compliance with these criteria is mandatory for both lots)

To be eligible to participate in this bidding, your company must be compliant with the below pre-selection criteria. Failure to comply will result in disqualification.

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Your company must be registered and eligible to do business in Netherlands	To establish compliance with these criteria: 1. Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent* 2. Vendor registration form to be filled out and submitted (Annex E)*
Data protection	Compliance with UNHCR data protection clause, please sign Annex D and send along with your proposal.
Fluency in Dutch	Confirmation on your technical proposal that for all operators working on this project agents are fluent in Dutch.

* In case your company is a registered (PO supplier) to UNHCR Netherlands, i.e., you have already received purchase orders, there is no need to re-send the above documents unless some changes are to be implemented on your current profile (address, bank account etc.). Please add the necessary comments to your technical offer. **Compliance with the rest of the pre-selection criteria is still mandatory.**

1.4 Mandatory samples to be sent for technical scoring

Please take note of the requested samples for technical scoring, see evaluation details under section 4. Please note that without samples, 0 points will be given for the corresponding technical scoring aspect.

Lot 1: Conversion, upgrades, reactivation and emergency calls

- ✓ one (1) sample report for daily result
- ✓ one (1) sample report of result summary
- ✓ one (1) performance analysis report

Lot 2: F2F verification calls (welcome calls)

PSP would like to receive sample report(s) or a sample dashboard that should include but are not limited to:

- ✓ Gross / Net recruitment
- ✓ Reach
- ✓ Qualitative feedback on performance of F2F acquisition based on calls

1.5 Joint venture, subcontracting

Please be informed that joint venture, or contractor/subcontractor relationships are allowed. In either case, the bidder needs to confirm which company is the project lead to take responsibility for the commercial relationship. The bid is to be submitted under one company, as leader. The winning bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

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2 REQUIREMENTS

2.1 General requirements for both lots

2.1.1 Standard Service Requirements

1. All agents need to be fluent in Dutch and English.
2. Minimum requirement: Working hours 9:00-21.00 (Mon-Fri)¹; and optional availability in case of humanitarian emergency: 9:00-14:00 (Sat)*;
3. Recording all relevant donor data (including emails, mobile phone numbers and updates of mail addresses) and other agreed upon data (e.g. CSS score, donor feedback);
4. Prepare donor export data files for UNHCR to be uploaded in UNHCR's donor database, Salesforce compliant;
5. Reports, statistics and key performance indicators on the activity (please specify in daily, weekly, monthly);
6. Analyses that can be done by telemarketing agency; please specify types of analyses and tools used;
7. Preparation of export/import formatted forms including donor data (the form is provided by UNHCR);
8. Sending confirmation emails or confirmation mails to donors;
9. Outbound calls taking place with caller ID according to Dutch Telemarketing rules and regulations;
10. Calls requiring special feedback to be redirected to UNHCR;
11. Human resources involved in the services have to be recruited and trained in order to reach adequate professional skills to deal with UNHCR donors. They are also supposed to be able to use the lists provided by UNHCR during phone calls as an information tool to give donors accurate and quick answers;
12. Description of a standard working team: number of operators, training, management and composition of the team (i.e. subcontractors, consultants, staff, etc.) for UNHCR Netherlands' dedicated account.

2.1.2 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 all call logs to UNHCR with no additional charges. All call logs should be provided to UNHCR securely and in compliance with the European General Data Protection Regulation if requested.
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.

¹ * These hours may vary and are indicative. Shifts should be performed in relation to regular telemarketing hours in the Netherlands.

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- 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. 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.
 5. The vendor is expected to comply with personal data privacy laws, including the European General Data Protection Regulation (GDPR) 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 voicelogs, DDMA etc.)
 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 among others:
 - a. Prepares and submits weekly, monthly and quarterly reports of telemarketing results;
 - b. Provide reports to measure key performance indicators (KPIs);
 - c. Provide input into data selection for campaign;
 - d. 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
 - e. Arrange quarterly face to face meetings with UNHCR.

2.1.3 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.

2.1.4 Compliance with the Government Requirement

The vendor shall comply with all Dutch 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. In addition, the vendor should comply with the European General Data Protection Regulation.

2.2 Lot 1: Conversion, upgrades, reactivation and emergency calls

Important notes:

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- Effective contact rate can be defined as the proportion of calls with a decision maker where the decision maker decides they will or will not accept our offer.
- Reactivation rate can be defined as the proportion of contacts that accepted to become again (regular) donors during the call/number of effective calls
- Upgrade rate can be defined as the proportion of contacts that accepted to increase their monthly donation during the call/number of effective calls

Campaign	Details	Target audience	Expected volumes + donors per year	Expected outcomes (KPIs)
1. Conversion call	To convert one-off donors into regular donors	Active one-off donors (made donation in last 12 months)	10,000-20,000 then 10-25% expected market growth each year	1. 55-65% effective contact rate on the provided list. 2. 15% positive conversions. 3. Average gift €11 per month
2. Upgrade call Regular donors	-To ask donors to increase their monthly gift amount with the option for a tax deductible donation (Periodieke Schenkingsovereenkomst) for a longer period.	1. Active Regular donors 2. Potential donors for tax deductible donations (5-year commitment) 3. Active Regular donors with potential to be upgraded to Middle donors	15.000 – 25.000 then 10% expected market growth each year	1. Minimum 50% effective contact rate of the list provided. 2. 25-30% of donors upgrade their gift. 3. Overall average gift increase is 35-45%.
3. Reactivation call	-To convert lapsed donors to monthly donors	Lapsed donors	10.000 – 15.000 then 30% expected market growth each year	1. Minimum 50% effective contact rate of the list provided. 2. 10% of lapsed donors converted 3. Overall average value of €120 per donor
4. Emergency campaign outbound calls	Ad hoc campaigns that will require urgent set-up and availability from telemarketing agents who are familiar with UNHCR and would have received new training on the emergency.	Outbound calls to selected segments to ask for an additional donation for the specific emergency.	10.000* *This is a best estimation then 10% expected market growth each year	1. Up and running within 24-48 hours after green light received from UNHCR 2. Minimum 55% effective contact rate of the list provided. 3. 15% donates to UNHCR

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The schedule and number of campaigns and records provided may vary and is subject to UNHCR's confirmation. Each campaign will be defined to the awarded telemarketing agency through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

2.2.1 Back-office services

- Campaign set-up (one-off)
- Uploading files to UNHCR (per file)
- Email set-up (one-off)
- Personalized confirmation email manually or automated (per email)
- Personalized confirmation letter to be sent to donors via post (per send)

2.2.2 Service Requirements during Humanitarian Emergencies

In case of a Humanitarian Emergency or during a large campaign, a dedicated plan needs to be developed. UNHCR aims to launch fundraising activities within 48 hours after an emergency. The call center should be able to be prepared to change script, to train agents, to arrange specific reporting and to manage high volumes of calls for emergencies in 24-48 hours.

Please present a detailed plan in line with the following requests:

1. Name, phone number and email address of focal point during emergency; the focal point, and back-up may also be reached during weekends;
2. Prepare donor export data files for UNHCR to be uploaded in UNHCR's donor database, Salesforce compliant;
3. Please describe if working hours would remain the same or if they could possibly be extended beyond regular office hours in the case of an important emergency campaign;
4. Timing for the start-up (including the production of scripts and training to the operators);
5. Technical capacity and management of a massive volume of calls in a very limited time;
6. Describe how quick you can upscale to ensure that your operations are ready to deal with an emergency;
7. Please indicate your capacity per hour and per day; a) average of daily/monthly calls able to be managed, b) maximum volume of daily/monthly calls able to be managed, c) percentage of managed calls within the first 20 seconds, and d) rate of calls not managed within the first 30 seconds;
8. Availability of operators (reserve roster) to be added to the standard service;
9. Reports, statistics and key performance indicators on the activity;
10. Preparation of export/import formatted forms including donor data (the form is provided by UNHCR);
11. Experience with emergency calls such as 'Giro 555'; and
12. Calls requiring special feedback to be redirected to UNHCR.

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2.3 Lot 2: F2F verification calls (welcome calls)

5. F2F verification calls (welcome calls)	Verification (welcome calls) to newly recruited F2F regular donors to verify they were recruited correctly and to welcome them as new donor	newly recruited F2F regular donors	2.000	1. Minimum 75% effective contact rate of the list provided.
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The schedule and number of campaigns and records provided may vary and is subject to UNHCR's confirmation. Each campaign will be defined to the awarded telemarketing agency through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

In the case of verification calls we require the callcenter to closely monitor and optimize the campaign to get high quality donors:

- It is a responsibility of call center to report timely to F2F supplier and UNHCR so adjustments can be made during the campaign in order to increase the recruitment of high-quality donors.
- To enable and facilitate F2F supplier and UNHCR with data driven insights upon request

2.3.1 Back-office services

- Email set-up (one-off)
- Personalized confirmation email manually or automated (per email)

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3 CONTENT OF YOUR PROPOSAL

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

No pricing information (i.e., fees) can be added to the technical offer. Please use Annex B (financial offer form) to confirm the overall cost proposal.

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) *telemarketing fundraising experience in the non-profit sector*.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *your company's compliance regarding the required services listed under point 2 as per relevant lot*; (2) *your company's capacity and strategy to achieve the proposed results*.

3.3 Personnel qualifications and experience

Please outline the experience of core people who will work on UNHCR project, including experience with similar projects. Please describe the composition of the team assigned to UNHCR and add a short Curriculum Vitae of the core staff (max half A4 page).

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4 EVALUATION

Only offers compliant with the pre-selection criteria will be considered for evaluation, please refer to clause 1.3.

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).

The minimum passing scores of the technical evaluation for each of the 2 lots 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.

4.1 LOT 1: Conversion, upgrades, reactivation and emergency calls

Company Qualifications (max 15 points)	Documents, information to be submitted to establish compliance with the set criteria
Service provision experience in the non-profit sector (max 15 points)	<p>Please list your clients for telemarketing services currently underway and/or completed in the non-profit sector (i.e., in the charity sector), and describe the type of calls and duration of work with each non-profit organization</p> <p>The scores will be allocated for the number of clients in the non-profit.</p>
Proposed services (max 45 points)	Documents, information to be submitted to establish compliance with the set criteria
Donor Retention and Development (max 10 points)	<p>A description of your company strategy to offer calling services for conversion, upgrade and reactivation campaigns, with any innovative solution proposed.</p> <p>The scores will be allocated based on the comprehensiveness and the quality of the strategy proposed</p>
Compliance with the requirements listed under General requirements 2.1.1 Standard Service Requirements (12.5 points)	Comprehensive proposal presented by addressing all requirements for Project Set-up & Training & Staff Deployment & Telemarketing Campaign Management.
Compliance with the requirements listed under General requirements 2.1.2 Operation Management (12.5 points)	<p>Comprehensive proposal presented by addressing all requirements for Operation Management & Supervision, human relations and Quality Control & Analysis and Reporting. The following samples are to be sent:</p> <ul style="list-style-type: none"> ✓ one (1) sample report for daily result ✓ one (1) sample report of result summary ✓ one (1) performance analysis report <p>Please note that without samples, 0 points will be given.</p>
Compliance with the requirements listed under 2.2 Conversion, upgrades, reactivation and emergency calls 2.2.1 Back-office services 2.2.2 Service Requirements during Humanitarian Emergencies (10 points)	Comprehensive proposal presented by addressing all requirements Project Set-up & Training & Staff Deployment & Telemarketing Campaign Management in case of a Humanitarian Emergency; and confirmation on services provided under back-office.

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Personnel Qualifications (max 10 points)	Documents, information to be submitted to establish compliance with the set criteria
Experience and skills of core team who will work on UNHCR project. (max 10 points)	The scores will be allocated based on the average years` of relevant experience of the core people working on the UNHCR account. Please describe the composition of the team assigned to UNHCR Very short Curriculum Vitae of the core staff (max half A4 page) is to be sent.

4.2 LOT 2: F2F verification (welcome) calls

Company Qualifications (max 20 points)	Documents, information to be submitted to establish compliance with the set criteria
Service provision experience in the non-profit sector (max 15 points)	Please list your clients for telemarketing services currently underway and/or completed in the non-profit sector (i.e., in the charity sector), and describe the type of calls and duration of work with each non-profit organization The scores will be allocated for the number of clients in the non-profit.
F2F verification (welcome) calls service provision experience in the non-profit sector (max 5 points)	Please list the number of F2F verification (welcome) calls program currently underway and/or completed in the non-profit sector (i.e., in the charity sector). The scores will be allocated for the number of clients.
Proposed services (max 40 points)	Documents, information to be submitted to establish compliance with the set criteria
Compliance with the requirements listed under General requirements 2.1.1 Standard Service Requirements (20 points)	Comprehensive proposal presented by addressing all requirements for Project Set-up & Training & Staff Deployment & Telemarketing Campaign Management.
Compliance with the requirements listed under General requirements 2.1.2 Operation Management (20 points)	Comprehensive proposal presented by addressing all requirements for Operation Management & Supervision, human relations and Quality Control & Analysis and Reporting. The following samples are to be sent; sample reports or a sample dashboard that that should include but are not limited to: <ul style="list-style-type: none"> ✓ Gross/Net recruitment ✓ Reach ✓ Qualitative feedback on performance of F2F acquisition based on calls Please note that without samples, 0 points will be given.
Personnel Qualifications (max 10 points)	Documents, information to be submitted to establish compliance with the set criteria
Experience and skills of core team who will work on UNHCR project. (max 10 points)	The scores will be allocated based on the average years` of relevant experience of the core people working on the UNHCR account. Please describe the composition of the team assigned to UNHCR Very short Curriculum Vitae of the core staff (max half A4

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4.3 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. Only Annex B can be used for financial proposals.

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5 KEY PERFORMANCE INDICATORS

UNHCR will monitor the performance of the supplier who will be awarded a contract as described under section 2.

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6 CUSTOMER RESPONSIBILITIES

UNHCR Netherlands will be responsible for;

- Appointing a dedicated project manager;
- Providing at least quarterly trainings 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 content for the call scripts;
- Providing contact list (data selection) for outbound calls;
- 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.