

Annex A: Terms of Reference
No. RFP/GRC/2024/001-PSP
Outbound and inbound telemarketing service for UNHCR Private Sector
Partnerships in Greece and Cyprus

Table of contents

1	Introduction.....	3
1.1	Background.....	3
1.2	Statement of Purpose & Objectives.....	3
2	Requirements	4
3	Content of the offer and evaluation.....	7
3.1	Technical Evaluation	7
3.2	Financial Evaluation	9

1 Introduction

1.1 Background

UNHCR www.unhcr.org

UNHCR, the UN Refugee Agency, is the world's leading organization dedicated to saving lives, protecting rights and building a better future for refugees. UNHCR operates in the field in over 134 countries, using its expertise to protect and care for refugees, returnees, internally displaced people, and stateless persons. UNHCR leads international action to protect people forced to flee their homes because of conflict and persecution. It delivers life-saving assistance like shelter, food and water.

Global refugee situation: Forced displacement, most of it arising from war and conflict, has risen sharply in the past decade, largely a result of the Syria crisis, but also due to a proliferation of new displacement situations and unresolved old ones. Some 80 million people are today forcibly displaced, of which 26.3 million are refugees. On 17 December 2018, the United Nations General Assembly affirmed the [Global Compact on Refugees](#). The Global Compact on Refugees provides a blueprint for governments, international organizations, and other stakeholders including the private sector to ensure that host communities get the support they need and that refugees can lead productive lives.

Private Sector Partnerships (PSP) service: UNHCR is almost entirely funded by voluntary contributions from governments and private donors.

UNHCR has an ambitious Private Sector Partnership (PSP) program which capitalizes donations from private-sector donors, through various channels including Face-to-Face, Direct Mailing, DRTV, Digital channels and Telemarketing. Fundraising in Greece mainly consists of Face-to-Face activities for acquisition purposes and Direct Mailing activities for existing donors' cultivation. As part of the international UNHCR PSP strategy, and in order to build a good relationship with new and existing donors, increase donors' retention and maximize contributions, PSP Greece is pushing a lot to increase its Telemarketing program.

1.2 Statement of Purpose & Objectives

The purpose of the present Request for Proposal (RFP) is to find qualified suppliers highly specialized in developing telemarketing activities (outbound and inbound calls) for fundraising programs, with existing local offices in Greece and a sound knowledge of the Greek and Cypriot market. Dedicated team members for the project should be excellent Greek speakers with good English knowledge.

PSP Greece would like to appoint a primary and a back-up provider to have contingency. The back-up supplier will be activated in case the primary fails to perform.

Service period: two (2) years, from June 2024 until May 2026, potentially extendable for a further period of one (1) year.

The proposed schedule:

- Starting up the set-up period as of mid-May 2024.
- Concluding the set-up period for all types of calls by end June 2024.
- The action and activities you expect from PSP Greece to support/facilitate your company in respecting the timing you indicate and/or a potential scale up of volumes.

The supplier will support PSP Greece in developing campaigns to reach the following objectives:

- Develop donors' loyalty and increase donor retention in Greece and Cyprus.
- Raise funds and maximize donations' value.
- Convert prospect leads to recurring donors.
- Recapture existing donors whose recurring donation fails.
- Reactivation of old donors' regular gift.
- Convert prospect inbound calls to donors.
- Provide first level UNHCR information to incoming calls.

2 Requirements

The supplier must develop the below Telemarketing activities during the reference period. Objectives per telemarketing activity, expected volumes and Key Performance Indicators are also provided for information purposes.

1. OUTBOUND - WELCOME CALLS

- Target: newly acquired recurring donors (1 day to 2 weeks)
- Objective: thank and welcome donors, check personal and financial details, check existing information given, give possible additional information about recurring donations, conduct surveys on donor preferences and experience.
- Expected volumes: weekly lists adding up (but not limited) to between 7.000 and 15.000 donors annually.
- Key Performance Indicator(s): 75% effective contacts ⁽¹⁾

2. OUTBOUND - 1st PAYMENT CALLS

- Target: recurring donors right after their 1st donation
- Objective: thank donors for donation and check information.
- Expected volumes: monthly lists adding up (but not limited) to anywhere between 6.000 and 12.500 donors on an annual basis.
- Key Performance Indicator(s): 75% effective contacts ⁽¹⁾

3. OUTBOUND - LOYALTY CALLS

- Target: existing recurring active donors recruited 6 months earlier.
- Objective: thank donors for continuous support, update them on specific matters, check that communication materials have been received, ask if they want more information, conduct surveys on donor preference and experience.
- Expected volumes: monthly lists adding up (but not limited) to between 5.000 and 11.500 donors annually.
- Key Performance Indicator(s): 75% effective contacts ⁽¹⁾

4. OUTBOUND - UPGRADE and CROSS-SELL CALLS

- Target: existing recurring active donors recruited 12 and/or 24 months earlier.
- Objective: increase the regular gift value or succeed an extra one-off donation.
- Expected volumes: monthly lists adding up (but not limited) to anywhere between 4.000 and 10.000 donors on an annual basis.
- Key Performance Indicator(s): 70% effective contacts ⁽¹⁾, 35% positive contacts ⁽²⁾, €6 average monthly gift increase ⁽³⁾ (or €40 average one-off gift) ⁽⁵⁾

5. OUTBOUND - RECAPTURING and REACTIVATION CALLS

- Target: recurring donors whose donation failed for technical reasons, insufficient funds, or cancelation.
- Objective:
 - Recapturing: check personal and bank details to understand the donation's failure reason and activate a new recurring donation if needed.
 - Reactivation: understand the cancelation reason, convince donors to reactivate the recurring donation and activate a new recurring donation if needed.
- Expected volumes: monthly lists adding up (but not limited) to between 8.000 and 15.000 donors annually.
- Key Performance Indicator(s): 60% effective contacts ⁽¹⁾, 50% positive contacts ⁽²⁾, €15 new average monthly gift ⁽⁴⁾

6. OUTBOUND - CONVERSION CALLS

- Target: newly acquired one-off donors (anywhere between 1 week to 3 months)

- Objective: thank donors for one-off donations, check and fulfil personal information, convert to recurring gift donors through bank account or credit card.
- Expected volumes: monthly lists adding up (but not limited) to between 2.000 and 4.500 donors annually.
- Key Performance Indicator(s): 50% effective contacts ⁽¹⁾, 25% positive contacts ⁽²⁾, €15 new average monthly gift ⁽⁴⁾

7. INBOUND - VERIFICATION CALLS

- Target: existing and new donors, public.
- Objective: provide PSP Greece with a landline (21XXXXXXXX) to give information regarding names and locations of Face-to-Face fundraisers and updated information about UNHCR's fundraising activities. Collect requests and information from donors/public, manage queries related to the Face-to-Face program and provide information and answers to queries from donors and the public during Emergency situations.
- Expected volumes: between 50 and 100 inbound calls annually.
- Key Performance Indicator(s): 80% of calls managed within the first 20", 15% of calls managed after the first 20", 5% lost calls.

8. INBOUND - EMERGENCY CALLS

- Target: public.
- Objective: it is possible, but not certain, that in an unpredicted time PSP will be required to respond to a major emergency at any point through a direct TV campaign, therefore, PSP will request the supplier for a landline (21XXXXXXXX) and a team (emergency-team) to support the TV campaign at any time. The duty of the emergency team is to collect the necessary data of prospective donors calling to respond to the campaign, such as full name, email address, mobile number or any other similar but not financial ones (e.g. cards, bank accounts etc.). Upon completion of the call(s), all information captured should be uploaded to PSP's system to automate the internal (PSP) process of sending a donation email (or sms) to prospect donors as soon as possible, and preferably within the next 5 minutes.
- Expected volumes: anywhere between 500 and 3.000 calls over the period of 3 to 30 days, but not necessarily limited to those figures, with forward-weighted time distribution.
- Key Performance Indicator(s): Key Performance Indicator(s): above 80% of calls managed within the first 20", 15% of calls managed after the first 20", less than 5% of lost calls.
- Important notes:
 - The supplier should have the ability to activate an emergency team consisting of no less than 5 agents within no less than 24 hours after notice from PSP. Notice can be during weekends or public holidays.
 - To respond to increased number of inbound calls and meet the abovementioned KPIs, the supplier should have the ability to expand the size of the team to 10 agents within the first 2 hours and to 15+ agents within the first 3 hours after the beginning of the campaign.
 - The emergency team working hours should be 24/7 during the beginning of the campaign, which then can be reduced according to the number of inbound calls and after consultation with PSP.
 - The members of the emergency team are not necessarily the ones of the standard/dedicated team. However, a short notice about the composition and the size of the team, as well as changes in course of the campaign, will be necessary.
 - Upon activation of the campaign, PSP will require one fully equipped working station to coordinate the campaign and support the emergency team.
 - A script will be developed ad-hoc and a respective training will be provided by PSP member(s) to address any issue within the emergency team prior to campaign's launch.
 - A connection between PSP's mass email/sms platform and the supplier's system should be in place well prior to the launch of the direct TV campaign. PSP will provide the necessary guidelines in due course.

9. SUPPORT - PCI COMPLIANT BOOTH

- Target: all the above calling activities that will require collecting financial data under GDPR directive (credit card, bank account, and any other relevant data) during the call.
- Objective: conclude any of the above inbound/outbound calls that require PCI compliance.
- Expected volumes: between (but not limited to) 1.000-1.750 calls on an annual basis.
- Key Performance Indicator(s): 80% of calls managed within the first 20", 15% of calls managed after the first 20", 5% of lost calls.

10. REPORTING CAPABILITIES

Please refer to Export File (Annex G):

- Please notice that before each TMK campaign begins, PSP Greece will provide the supplier with a contact list containing donors' information (from column 1 to column 73 of sheet "Template" of attached "Export File" Annex G). Depending on the activity, the supplier is required to periodically generate an export file containing all the columns (from column 1 to column 139), even if empty, in the same order and format. The original values (columns 1-73) provided by PSP Greece must be exported without any changes. If, for example, some of the original information needs to be updated after the call, these updates must be exported in the relevant column starting with the prefix "Var" (columns 74-139). The export file also contains the outcome of the telemarketing activity. Possible outcomes will be defined by PSP Greece.
- A confirmation of existence of an internal quality-check process for the "Export File" (Annex G) in accordance with PSP Greece necessities.
- Please notice that a data validation check must be done before the file is returned to PSP Greece. This check is crucial to verify the coherence between outcomes and indicated variations (e.g. not-reachable calls cannot contain data variations in any field in columns 74-139, or e.g. if the outcome an upgrade call is positive, the amount of the recurring donation in columns 74-139 must be different from the amount of the recurring donation in columns 1-73).

11. INFORMATION SYSTEM

- PSP Greece request for details in term so the information systems your company is having in place. This can include storing/managing information and file types supported, call center software, back-up system in case of damage, training info library, and many other things relevant to their systems architecture.
- This is requested to show evidence on real time quality assessment, reporting etc. to ensure business continuity.

12. MONTHLY TRAINING

- Regular training is provided by UNHCR PSP Greece team. This training consists of role-plays with telemarketing agents to co-shape the script. The selected supplier is requested to facilitate the training and to assist UNHCR PSP Greece team to organize it.

13. IMPORTANT NOTES AND GLOSSARY

(1) Effective contacts: all records of the list provided with whom we had an effective dialogue, i.e. donors in person who answered the call and listened to the script.

(2) Positive contacts: the % of the effective contacts who agreed to donate after the ask.

(3) Average monthly gift increase: the sum of the monthly amounts which after the ask is on top of the existing amounts, divided by the number of donors who agreed to increase their donation.

(4) New average monthly gift: the sum of the new monthly amounts, divided by the number of donors who agreed to start/restart/reactivate their donation.

(5) Average one-off gift: the sum of the one-off gifts, divided by the number of donors who agree to make a one-off gift.

3 Content of the offer and evaluation

For the award of this project, UNHCR has established evaluation criteria which govern the selection of offers received. Evaluation will be made on a technical and financial basis and the percentage assigned to each component is determined as following. We work on a 100 points scales and 70% (i.e. 70 points) are assigned to the technical components and 30% (i.e. 30 points) for the financials. The contract is awarded to the bidder achieving the highest consolidated scores (technical & financial).

Please fill out Annex B as your Technical response form and attach all mandatory document, as requested.

Note: your offer shall be prepared in English.

3.1 Technical Evaluation

The following section lists all selection criteria as part of the first yes/no cut. In this regard, your company must be compliant with all the below requirements to considered as eligible for the technical evaluation.	
Company registration documents	Documents & information to be provided to establish compliance with the evaluation criteria
Eligibility to do business in Greece	Provide with your Technical response form (1) your company registration certificate (accepted in Greek) to prove that your company is eligible to provide telemarketing services in Greece.
Applicable terms and conditions	Documents & information to be provided to establish compliance with the evaluation criteria
PCI - DSS compliance	Provide with your Technical response form the PCI DSS – PCI Security Standards Council accreditation,
Information security and quality management	Provide with your Technical response form ISO certification relevant to Information Security Management and Quality Management Systems,
GDPR compliance	Provide on your Technical response with a self-declaration confirming that your company is compliant with EU General Data Protection Regulation.
Company experience as minimum requirements	Documents & information to be provided to establish compliance with the evaluation criteria
Minimum 7 years in the telemarketing business	Provide a list of telemarketing projects/clients on your Technical response form with start and end date to show evidence that your company has at least 7 years in the telemarketing business in general.
Minimum 3 years in the telemarketing business for charity sector	Provide a list of telemarketing projects/clients from Greece charity sector on your Technical response form with start and end date to show evidence that your company has at least 3 years in the telemarketing business for charity sector in general.
Dedicated account management team	Confirm on your Technical response form the structure of the dedicated working team; to show evidence that one (1) manager, one (1) team leader and five (5) telemarketing agents are assigned full time to UNHCR account. The telemarketing agencies must be all fluent in Greek.
Minimum working hours	Provide confirmation on your Technical response form that your company can meet the following standard working hours about inbound calls: <ul style="list-style-type: none"> Minimum working hours 9:00-21:00 from Monday to Friday, local time in Greece

	<ul style="list-style-type: none"> • Answering machine 21:00-09:00 from Monday to Friday, local time in Greece and 24hrs from Saturday to Sunday.
Emergency preparedness	Confirm on your Technical response form that a team of agents can be deployed during emergency according to specifications described in section 2.8.
Reporting capabilities	Confirm on your Technical response form of daily provision of the "Export File" (Annex G) as well as the existence of an internal quality-check according to specifications as per section 10.
Real time email communication	Confirm on your Technical response form the ability to communicate real-time with PSP Greece in case of follow-up activities needed.
Real time quality assessment tools on calls	Confirm on your Technical response form the existence of a real-time quality assessment tool to secure performance.
Number of attempts per phone number provided	Confirm on your Technical response form that your company will comply with minimum 5 attempts for each phone number provided before returning as not-reached contact.
Visible calling numbers and voice mail service provided	Confirm on your Technical response form the provision of visible calling numbers to secure performance and voice mail service to respond to inbound calls generated by outgoing calls.
The following section lists all requirements for technical scoring; only bidders that will score equal or above 35 points (of the 70 points) will be considered for financial evaluation.	
Capacity to achieve proposed monthly volumes (30 points)	<p>Provide a brief explanation on your Technical response form how your will achieve the objectives, KPIs as listed under each call type under section 2. Please support your strategy by achieved results/KPIs with other charity clients on the Greek landscape. Please also confirm if your company can secure the continuity of business through multiple working sites (different cities/prefectures); i.e., to have multiple sites where agents can continue working on UNHCR fundraising telemarketing campaigns in the case of their basic premises are not accessible.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP Greece.</p>
Ability to scale up volumes (20 points)	<p>Provide a brief explanation on your Technical response form how your company can even exceed the proposed volume (as listed under Annex C). Please support your strategy by achieved results/KPIs with other charity clients on the Greek landscape.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP Greece.</p>
Information system (10 points)	<p>Provide details on your Technical response form in term of the information systems your company is having in place. This can include storing/managing information and file types supported, call center software, back-up system in case of damage, training info library, and many other things relevant to their systems architecture.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP Greece.</p>

Account management (10 points)	<p>Provide information on the proposed team`s experience on your Technical response form in terms of years in the telemarketing business:</p> <p>One (1) manager one (1) team leader five (5) telemarketing</p> <p>The scores will be allocated based on the number of years of experience in the telemarketing business.</p>
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3.2 Financial Evaluation

Please fill in Annex C for your price proposal. Please note that:

- Bids that have a different price structure may not be accepted.
- The financial offer must cover all the services to be provided (price “all inclusive”).
- UNHCR is exempt from all direct taxes and custom duties, therefore price must be given without VAT.
- You are requested to hold your offer valid for 90 days from the deadline submission, UNHCR will make its best effort to select a company within this period.
- The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

The maximum points will be allotted to lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

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 (Euro) to provide your quotation.

Any Purchase Order (PO) issued because of this RFP will be made in Euro currency. Payment(s) will be made in accordance with the General Conditions of Contract for the Provision of Services (Annex E) and in Euro currency. Payment(s) shall only be initiated after confirmation of successful completion by UNHCR business owner.

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).

IMPORTANT

The technical proposal and the financial offer are to be sent in separate documents. Failure to do so may result in disqualification.