

**UNHCR**United Nations High Commissioner for Refugees
Haut Commissariat des Nations Unies pour les réfugiés

DATE: 12/05/2023

REQUEST FOR PROPOSAL: No. RFP/23/004/RBAP/PSP**FOR THE ESTABLISHMENT
OF A FRAME AGREEMENT(S) FOR THE PROVISION OF
FOR TELEMARKETING INBOUND & OUTBOUND SERVICES IN HONG KONG SPECIAL
ADMINISTRATIVE REGION (Hong Kong SAR) OF CHINA
CLOSING DATE AND TIME: 09 June 2023 by 23:59 GMT +8hrs. (Hong Kong time zone)****INTRODUCTION TO UNHCR**

The Office of the United Nations High Commissioner for Refugees was established on 14 December 1950 by the United Nations General Assembly. UNHCR is mandated by the United Nations to lead and coordinate international action for the worldwide protection of refugees and the resolution of refugee problems. UNHCR is an impartial organization, offering protection and assistance to refugees and others based on their needs and irrespective of their race, religion, political opinion or gender. In all activities, UNHCR pays attention to the needs of children and seeks to promote the equal rights of women and girls. In its efforts to protect refugees and to promote solutions to their problems, UNHCR works in partnership with governments, regional organizations, international and non-governmental organizations.

The Office of the United Nations High Commissioner for Refugees (UNHCR) in Hong Kong started fundraising activities since 2007. People around the world who wish to support UNHCR's work could make financial contributions through its Sub-Office Hong Kong. Private Sector Partnerships (PSP) of UNHCR continues to rapidly expand its activities in Hong Kong, by using telemarketing services, making phone calls to donors or potential donors to appeal them to make donation to UNHCR to raise fund to support UNHCR's global refugee work.

1. REQUIREMENTS

UNHCR PSP Hong Kong is soliciting firms with expertise in inbound and outbound telemarketing for a special fundraising campaign to provide high quality services for contacting UNHCR donors. .

IMPORTANT:

The Terms of Reference (TOR) are detailed in Annex A of this document.

The selected provider will be requested to maintain their quoted price model for the duration of the Frame Agreement.

PSP Hong Kong might appoint two vendors to set-up the program in a more sustainable way. In this regard a primary and a back-up vendor might be selected. The back-up vendor will be activated in case the primary one fails to perform.

It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Sub-Contracting: Please take careful note of article 5 of the attached General Terms and Conditions (Annex D).

Note: this document is not construed in any way as an offer to contract with your firm.

IMPORTANT:

When a Frame Agreement is awarded, either party can terminate the agreement only upon 30 days' notice, in writing to the other party.

The initiation of conciliation or arbitral proceedings in accordance with **article 18** "settlement of disputes" of the UNHCR General Conditions of Contracts for provision of Goods and Services shall not be deemed to be a "cause" for or otherwise to be in itself a termination clause.

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form integral part of this Request for Proposal:

Annex A:	Terms of Reference (TORs)
Annex B:	Financial Offer Form
Annex C:	Vendor Registration Form
Annex D:	UNHCR General Conditions of Contracts for the Provision of Services
Annex E:	UNHCR Special Data Protection Conditions
Annex F:	eTenderBox Supplier User Manual
Annex G:	Registration Guide for eTenderBox

Please kindly note that this RFP is also posted on the UNHCR global site and the UNGM site.

2.2 ACKNOWLEDGMENT

We would appreciate your informing us of the receipt of this RFP by return e-mail Esther Wai-Sze Chan at chane@unhcr.org and Rachel Bagnall at bagnall@unhcr.org as to:

- Your confirmation of receipt of this request for proposal
- Whether or not you will be submitting your proposal

IMPORTANT:

Failure to send the above requested information may result in the disqualification of your offer from further evaluation.

2.3 REQUESTS FOR CLARIFICATION

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Esther Wai-Sze Chan at chane@unhcr.org and Rachel Bagnall at bagnall@unhcr.org **the deadline for receipt of questions is the 29 of May 2023 23:59 GMT +8 hrs. (Hong Kong time zone)**. Bidders are requested to keep all questions concise.

IMPORTANT:

Please note that Bid Submissions are NOT to be sent to the e-mail address above.

UNHCR will compile the questions received and will publish the consolidated Q&A File on UNHCR Global website, UNGM and inform all invited bidders. UNHCR may, at its discretion, copy any reply to a particular question to all other invited bidders at once.

2.4 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 in Hong Kong SAR and to be able to do business in Hong Kong SAR	To establish compliance with this criteria, Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent.
Data protection	Compliance with UNHCR data protection clause, please sign Annex E and send along with your proposal.
Security of income processing	<p>Your company must be compliant with ONE of the below requirements:</p> <p>1. PCI compliance Payment Card Industry compliance refers to the technical and operational standards that businesses follow to secure and protect credit card data provided by cardholders and transmitted through card processing transactions. PCI standards for compliance are developed and managed by the PCI Security Standards Council. PCI DSS Level 1 – PCI Security Standards Council certificate to be submitted to establish compliance with the criteria. https://www.pcisecuritystandards.org/</p> <p>2. Other certificate which is the proven for protecting the data and information security on income processing, for example ISO 27001.</p>

2.5 YOUR OFFER

Your offer shall be prepared in English. Please submit your offer using the Annexes provided. Offers not conforming to the requested formats may not be taken into consideration.

IMPORTANT:

Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than the submission e-mail address will result in disqualification of the offer. Please send your bid directly to the address provided in the “Submission of Bid” section 2.6) of this RFP.

Your offer shall comprise the following two sets of documents:

- Technical offer
- Financial offer

2.5.1 Content of the TECHNICAL OFFER

IMPORTANT:

No pricing information should be included in the Technical offer. Failure to comply may risk disqualification. The technical offer should contain all information required.

The Terms of Reference (TORs) of the services requested by UNHCR can be found in **Annex A**.

Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

1.1.1 2.5.1.1 Project Set-up

- The Vendor shall set up pre-launch meetings with UNHCR to:
 - Understand the UNHCR's fundraising operation
 - Collect, select, and edit the information for use in the Project
- Customization of database system for UNHCR
 - Upload provided donor data to a secured database system for UNHCR to check and approve
- Customization of telemarketing system for UNHCR
 - Set up adequate IT and telephone system that is suitable for the Project with functions including but not limited to:
 - Customer relationship management
 - Automatic call distribution
 - Interactive voice response
 - Voice mail
 - Any other functions that the Vendor recommends achieving the goals of this Project
- Account Management
 - the Vendor shall continue managing the Project within the agreed period, hold discussion sessions with UNHCR staff periodically for improvement of the Project and implement mutually agreed decisions

2.5.1.2 Training & Staff Deployment

- The Vendor shall develop suitable materials for outbound calls (answering enquiries, etc.). The content of the materials shall be approved by UNHCR. The Vendor will use the approved materials for training purpose.
- Competent management staff shall be assigned to be responsible for training supervisors and front-line tele-marketers, as well as to supervise the Project, including monitoring of the performance of the front-line tele-marketers and the quality of each call;
- The Vendor shall ensure that only trained front line tele-marketers can participate in this project. The operational expenses incurred for training tele-marketers should be at the cost of the Vendor;

2.5.1.3 Telemarketing Campaign Management

Campaign Details & KPIs

- UNHCR will provide below call lists to the Vendor. Appointed vendor should not spend longer than the agreed duration period of each project to meet the pre-agreed conversion rate.
 - UNHCR requests proposals to provide services including but not limited to the scope of work described below.
 - UNHCR expects the vendor charge based on successful case(s)

Campaign details:

A) Outbound TM programmes (Station at vendor's call centre)

Credit Card Debit Fail

To call donors whose monthly donation by credit card had failed with a view to updating credit card details to continue the monthly donation

Bank Autopay Debit Fail

To call donors whose monthly donation by bank autopay had failed with a view to provide new bank account or credit card details to continue the monthly donation

One-time Conversion

To call new or existing one-time donors and appeal them to donate monthly

Mass One-time Conversion

To call existing one-time donors and appeal them to donate monthly

Special Appeal

To call and appeal donors to make a one-time donation

Monthly Upgrade (Individual donor / Middle value donor) & Mass Upgrade

To call existing monthly donors and request them to donate additional monthly donation with suggested donation ask and earmark by UNHCR

Reactivation

To call and convert donors who has cancelled their monthly donations and appeal them to reactivate the monthly donation

Resumption

To call donors who has suspended their monthly donations for a set period and appeal them to resume the monthly donation

Ad Hoc Emergency Appeal

To call and appeal donors to make a one-time donation during emergency

Important notes:

- Effective contact rate can be defined as the 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'
- Conversion rate can be defined as the proportion of contacts that accepted to become regular donors during the call/contact over the total list of contacts provided
- Successful rate: Existing monthly donor agreed to donate additional monthly donation with the donation ask and earmark suggested by UNHCR
- One-time donation is excluded, except the campaign of special appeal and ad hoc emergency appeal.
- The number of calls for each target donor is set to 3 times

Expected outcome and KPI's can be found in Annex A Terms of Reference

Ad Hoc Donor Care Campaign:

The call agent is stationed at UNHCR's office to receive inbound calls, make outbound calls for handling the ad hoc donor care campaigns and/or emergency appeals.

Call logs and other operation requirement

- The Vendor is required to give access of all call logs to UNHCR (i.e. successful, consider and unsuccessful) with no additional charge. All call logs should also be provided to UNHCR on daily basis by programme.
- For successful cases, UNHCR would request the Vendor to retain call logs for a period of no less than 18 months. For other cases, UNHCR would request the Vendor to retain call logs for a period of no less than six months. UNHCR requires the Vendor to transfer all call logs to UNHCR upon request.

- Our donor base includes donors from Mainland China and Macau, estimated about 10% of donors in the list needs IDD call, price quoted should include IDD expenses. The cost of IDD call is count of actual spent.
- The call list may contain around 5% English and Mandarin speaking donors, the tele-marketers are expected to be able to communicate in effective English and Mandarin with no additional charge.
- Potential donor may request tele-fundraiser to send the UNHCR donation form by email for completing the donation instead of via phone confirmation, hence vendor is required to share the contact list of this request to UNHCR daily, so that UNHCR will be able to send out the necessary information thru UNHCR email system.

Operation Management

- The Vendor is required to propose the number of trainers, supervisors, and front-line tele-marketers for this Project (staff). The proposed number of staffs could be working for this Project on a full-time or part-time (shared workload) basis. Whichever is the arrangement, the Vendor needs to provide the information clearly in the proposal and implement accordingly
- Provide telemarketing script for each of the campaign for UNHCR review and approval before the launch; and
- Ensure UNHCR data are treated in the strictest confidence and compliance with the Personal Data (Privacy) Ordinance of Hong Kong SAR which is located at: www.pcpd.org.hk/english/data_privacy_law/ordinance_at_a_Glance/ordinance.html and the UNHCR Special Data Protection Conditions (**Annex E**)

Supervision and Quality Control

- Record all call logs and donor feedback, all call logs must be securely transferred to UNHCR on daily basis
- Control the quality of all outbound calls made by the front-line tele-marketers

Operation and Analysis Report

- Design operation reports that can capture the progress and performance of the Project. For example, daily result report and summary report, etc.
- Operation reports should be delivered on daily basis
- An individual report to capture final responses of all donors after completing each campaign
- Provide analysis report with recommendation within one month upon completion of each campaign for UNHCR to review and evaluate the performance and effectiveness

Additional Requirements

Vendor is required to provide the following based on the abovementioned conditions:

- Motivation and Training
- Plan, develop, and maintain motivation schemes as deemed appropriate to all tele-fundraisers along with regular training;
- Provide regular training for all tele-fundraisers to understand the latest progress of UNHCR's work locally and globally around the world.
- Monitoring Tele-fundraisers and Code of Conduct
- Ensure that no tele-fundraisers engage in any misleading or deceptive conduct;
- Ensure that no tele-fundraisers commit to any act which may compromise the image, brand, and interests of UNHCR; and
- Ensure that all tele-fundraisers comply with applicable local laws and regulations whilst carrying out activities in relation to UNHCR projects.
- Vendor is expected to be able to meet the pre-set timelines.

Performance of Work

- Conduct daily and weekly performance assessments of tele-fundraisers or staff relating to this project;
- Conduct daily and weekly call quality assurance of tele-fundraisers or staff relating to this project;
- Responsible to provide all supervision, equipment, human resources, and materials necessary to complete this project as described herein;
- Provide quality control and to explain how quality of outbound and telemarketing calls is done with front-line telemarketers. In addition, the vendor is also expected to describe their procedures regarding complaint management.
- Supervise and complete this project using its best skill, experience, and attention;

- Furnish management, supervision, coordination, human resources, and services which expeditiously, economically, and properly complete its scope of work, and comply with the requirements of this Terms of Reference (Annex A);
- All services rendered by vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered; and
- Conduct all its activities in strict confidence while handling and respecting data privacy in compliance with the principle of Personal Data (Privacy) Ordinance of Hong Kong SAR and the UNHCR Special Data Protection Conditions (Annex E).

Compliance with Government Regulations

The Vendor shall comply with all applicable laws, statutes, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the Project;

The Vendor shall give all notices required of it by governmental authorities relating to the Project.

If the Vendor violates laws or regulations that govern the Project, the Vendor shall indemnify and hold UNHCR harmless from and against any fines and/or penalties that result from such violation. To the extent that such violation is the result of negligence or other actionable conduct of the Vendor, the Vendor shall indemnify and hold UNHCR harmless against any third-party claims, suits, awards, actions, causes of action or judgments, including but not limited to legal fees and costs incurred thereunder, that result from such violation.

Rejection and correction of work

During the Project, the Vendor shall supervise and promptly discontinue any activities which (i) does not conform to the requirement in this Terms of Reference (Annex A), or (ii) does not comply with any applicable law, statute, ordinance, code, rule or regulation of any authorities and agencies having jurisdiction over the Project.

UNHCR reserves the right to reject any work performed by the Vendor, in whole or in part, that, UNHCR's sole and absolute discretion, are unsatisfactory, unacceptable, undesirable, or inappropriate.

The Vendor shall promptly correct or require the correction of all rejected work and shall bear all costs of correcting such work.

2.5.2 Content of the FINANCIAL OFFER

Your separate **Financial Offer** must contain an overall offer in a single currency, which shall be HKD.

The financial offer must cover all the services to be provided (price "all inclusive").

The Financial Offer is to be submitted as per the Financial Offer Form (Annex B). Bids that have a different price structure may not be accepted.

UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes. Please use single currency (HKD) to provide your fee structure and sum-up the total cost for this project.

2.5.3 Supplier Registration:

The qualified supplier(s) will be added to the Vendor Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents. The investigation involves consideration of several factors such as:

- Core business;
- Track record;
- Contract capacity.

2.6 BID EVALUATION:

Each proposal from a Bidder will be considered separately and independently. Award of a previous contract with UNHCR will not be considered in itself as a preference or guarantee for the award of future solicitations on the same subject.

2.6.1 Technical evaluation:

Only offers passed the pre-selection will be technically evaluated.

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. 70 points are allocated for the technical component).

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Service provision experience in the non-profit sector (max 10 points)	<p>Please provide list of clients, current and previous ones from the past 5 year from the charity sector.</p> <ul style="list-style-type: none"> ○ List client name and provide project description on the number of clients for inbound and outbound services experience. <p>The scores will be allocated for the number of clients and the description of services in the charity sector, based on the evidence provided.</p> <p>Please note that without the above information, 0 score will be allocated for this technical aspect.</p>
Service provision experience in the for-profit (private) sector (max 10 points)	<p>Please provide list of clients, current and previous ones from the past 5 year from the private sector.</p> <ul style="list-style-type: none"> ○ List client name and provide project description on the number of clients for inbound and outbound services experience. <p>The scores will be allocated for the number of clients and the description of service in the for-profit sector, based on the evidence provided.</p> <p>Please note that without the above information, 0 score will be allocated for this technical aspect.</p>
Proposed Services (max 35 points)	Documents, information to be provided to establish compliance with the set criteria
Project Set-up, Training & Staff Deployment (max 10 points)	Comprehensive proposal presented by addressing all requirements under 2.1
Telemarketing Campaign Management (max 15 points)	<p>Comprehensive proposal presented by addressing all requirements under 2.2 (including Campaign Management; Operation Management; Supervision and Quality Control; Operation and Analysis). Please include:</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 the above samples, 0 score will be allocated for this technical aspect.</p>
Company's capacity and strategy to achieve the proposed results (max 10 points)	Comprehensive strategy presented to demonstrate capacity to achieve the proposed results under section 2.2.1 Campaign Details & KPIs.

Personnel Qualifications (max 15 points)	Documents, information to be provided to establish compliance with the set criteria
Experience and skills of core team who will work on UNHCR project. (max 10 points)	<p>The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.</p> <ul style="list-style-type: none"> Describe the telemarketing agents experience including project description and working for charities (non-profit) in a form of a short CV, maximum half A4 page <p>Please note that without the above information, 0 score will be allocated for this technical aspect.</p>
Account management and turnover rate (max 5 points)	<p>Describe whether and how you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the ToRs;</p> <p>Describe current headcount volume for: Telemarketing agents Team Leaders Coach/Trainer</p> <p>Include any additional field position present in your company. Specify on 2022 turnover rate.The scores will be allocated based on the account management strategy and turnover rate.</p>

Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal to be considered further for the financial evaluation.

2.6.2 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.

The financial proposal is based on:

- PART A: annual fixed cost for set-up and training services
- PART B: Credit Card Debit Fail Campaign, Bank Autopay Debit Fail Campaign, One-time Conversion Campaign, Mass One-time Conversion Campaign, Special Appeal Campaign, Reactivation Campaign costs
- PART C: Resumption Campaign, Monthly Upgrade Campaign (Individual Donor), Monthly Upgrade Campaign (Middle value donor), Mass Upgrade Campaign, Ad hoc Emergency Appeal Campaign costs
- PART D: Ad Hoc Donor Care Campaign, Cost per working day at UNHCR's office

2.7 SUBMISSION OF BID:

Bids should be submitted by file upload to eTenderBox, the online bid registration tool of UNHCR. The eTenderBox can be accessed via the following URL:

<http://etenderbox.unhcr.org>

In order to use eTenderBox, registration on the website is required. This registration is exclusively for eTenderBox and does not replace any other registration with UNHCR.

A supplier should have only one registered email account in the system. The supplier must use only that eTenderBox account for managing its offers to UNHCR.

In case the password is forgotten that account cannot be used anymore, and new registration is required. The eTenderBox Registration Guide and Use Manual are available at the above URL and provided as annexes to this RFP.

IMPORTANT:

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

Allowed extension for files to upload are .doc, .docx, .xls, .xlsx, .rtf, .png, .jpg, .jpeg, .pdf, .txt, .zip, .ppt, .pptx, .mbp, .rar, .gif, .tif and .tiff. Executable files (.exe, .bat, .cmd, etc.) should not be uploaded. The maximum size limit per file is 10MB.

Uploaded files can be amended by the Supplier while the tender is open. The selected files for upload are submitted when the 'Save & Submit' button is clicked on. Therefore, this button must be clicked before the deadline expires. If done so, the selected files will be submitted and uploaded successfully even if the deadline expires during the file upload. It is the Supplier's responsibility to ensure that all files of the final offer are submitted by the tender expiration deadline.

Once the deadline for submission is expired, the bid will be automatically closed after which the uploaded files can be reviewed but options for additional upload and deletion of previously uploaded files are not available anymore. To ensure the safe submission of the full and final offer, it is recommended to have all files uploaded well before the tender deadline.

Deadline: 09 June 2023 by 23:59 GMT +8hrs. (Hong Kong time zone)

IMPORTANT:

Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

It is the supplier's responsibility to verify that documents and correspondence have been submitted properly before the deadline. UNHCR will not be responsible for locating or securing any information that is not identified in the bid. Accordingly, to ensure that sufficient information is available, the bidder shall furnish, as part of the bid, any descriptive material such as extracts, descriptions, and other necessary information it deems would enhance the comprehension of its offer.

2.8 BID ACCEPTANCE:

UNHCR reserves the right to accept the whole or part of your bid.

UNHCR may at its discretion increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the rate submitted. Any such increase or decrease in the contract duration would be negotiated with the successful bidder as part of the finalization of the Purchase Orders for Services.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs, as well as conforming to UNHCR's general principles,

including economy and efficiency and best value for money. UNHCR might select a primary and a back-up supplier per lot to set up the programs in a more sustainable way.

2.9 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

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

2.10 UNHCR GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF GOODS AND SERVICES

Please note that the General Conditions of Contracts (**Annex D**) will be strictly adhered to for the purpose of any future contract. The Bidder must confirm the acceptance of these terms and conditions in writing.

Yours faithfully,



Goran Stojanovski
Senior Supply Officer
United Nations High Commissioner for Refugees (UNHCR)
Regional Bureau for Asia Pacific (RBAP) Bangkok