



Annex A: Terms of Reference
RFP/24/009/RBAP/PSP

REQUEST FOR PROPOSAL FOR TELEMARKETING SERVICES FOR UNHCR PRIVATE
SECTOR PARTNERSHIPS IN THE REPUBLIC OF KOREA

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Yun Ling at ling@unhcr.org and to Rachel Bagnall at bagnall@unhcr.org

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1 Introduction

1.1 Background

Since starting private sector fundraising operation in 2009, the Office of the United Nations High Commissioner for Refugees in the Republic of Korea (hereinafter, UNHCR Korea) has over 220,000 monthly giving donors and partners recruited through various fundraising programs such as Face-to-Face(F2F), Digital, Direct Responses Television (DRTV) and corporate giving.

The importance of the donor development has grown as the fundraising market conditions have changed, and UNHCR plans to identify a competent service provider for the provision of high-quality, cost-effective telemarketing services.

1.2 Statement of Purpose & Objectives

UNHCR PSP Korea is seeking to enter into frame agreement with a qualified agency to provide outbound telemarketing services for donor development, with initial duration of 12-months, potentially extendable for a further period of two times 12-months period, upon satisfactory performance, as per below:

Phase 1: 1 July 2024 – end of June 2025 (12-months)

Phase 2: 1 July 2025 – end of June 2026 (12-months)

Phase 3: 1 July 2026 – end of June 2027 (12-months)

1.2.1 Objectives for Telemarketing Services

To implement telemarketing services the agency is expected to achieve following targets:

- 40% average contact rate for overall outbound calls
- 30% success rate for Upgrade calls (vs. valid contact)
- 30% success rate for Reactivation of actively lapsed donors (vs. valid contact)
- 10% success rate for Conversion calls (vs. valid contact)

The breakdown the number of donors for call programs are as below:

Telemarketing Calls	Phase 1	Phase 2	Phase 3	Total
Upgrade Call	12,000	15,000	16,000	43,000
Reactivation Call	10,000	10,800	12,000	32,800
Conversion Call	3,000	4,000	6,000	13,000
Total	25,000	29,800	34,000	88,800

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.

1.3 Pre-selection criteria (compliance with these criteria is mandatory)

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 and information to be provided to establish compliance with the set criteria
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Your company must be registered and eligible to do business in Korea	To establish compliance with these criteria: <ol style="list-style-type: none">1. Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent2. Vendor registration form to be filled out and submitted (Annex C)
Data protection	Compliance with UNHCR data protection clause, please sign Annex D and send along with your proposal.
UNHCR General Terms and Conditions	Compliance with UNHCR general terms and conditions (Annex E)
Security of data and information	Your company must be compliant with ONE of the below requirements and submit the copy of certificate: <ol style="list-style-type: none">1. ISO 27001 (https://www.iso.org/isoiec-27001-information-security.html)2. Personal information & Information Security Management System (ISMS-P) (https://isms.kisa.or.kr/main/ispims/intro)

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2 Requirements

2.1 Telemarketing Services

Important notes:

- 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'
- Upgrade rate can be defined as the proportion of contacts that accepted to increase their regular giving donation, without setting donation period, during the call/contact over the total contacted.
- Reactivation rate can be defined as the proportion of contacts that accepted to become again regular giving donors, without setting donation period, during the call or via a web link sent to donors upon their request/contact over the total contacted.
- Conversion rate can be defined as the proportion of contacts that accepted to convert to regular giving donors, without setting donation period, during the call or via a web link sent to donors upon their request/contact over the total contacted.
- The number of calls for each target donor is set to 3 times

Table. Type of Call and KPIs

Type of Call	Details	Target	Expected Outcome (KPIs)
Upgrade call	To ask donors to increase their monthly gift amount	Donors who have signed up 7 months ago	-Contact rate: 40% -Upgrade rate (vs. contact): 30% -Average gift 15,000 KRW per month
Reactivation call	To ask resume of the donation to cancelled donors	Donors who cancelled the regular giving donation 7 months ago	-Contact rate: 40% -Reactivation rate (vs. contact): 30% -Average gift 15,000 KRW per month
Conversion call	To convert one-off donors into regular giving donors	Donors who have donated one-time gift	-Contact rate: 40% -Conversion rate (vs. contact): 10% -Average gift 15,000 KRW per month

Additional note:

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 Requirements.**

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

2.2 Standard Requirements for Telemarketing Services

In the Technical Offer please detail how your company can implement and satisfy the Standard Service requirements, which are as follows:

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- 1) All call agents need to be fluent in Korean.
- 2) Working hours 9:00-18:00 or 10:00-19:00 (Mon-Fri) on each working day based on Korean calendar.
- 3) Call agents to handle credit card and debit account number by using the donor management application which is provided by UNHCR as well as to record every communication history with donors.
- 4) 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.
- 5) Provision of all human relations activities related to staffing for UNHCR Korea's call programs including:
 - a) Planning and coordinating the recruitment of highly competent staff to effectively perform the call programs.
 - b) Planning, development, and maintenance of motivation schemes as deemed appropriate.
- 6) Provision of one manager to serve as a focal point to oversee the effective implementation of the Telemarketing Services including:
 - a) Reporting performance of Telemarketing Services regularly and irregularly as deemed appropriate.
 - b) Provision of comprehensive training and coaching to agents to ensure the call quality and to develop the performance of the program.

2.3 Operations Management for Telemarketing Services

The vendor is also required to include the following (if applicable) in their proposals:

- 1) The vendor is required to present their strategies on how to achieve the Expected Outcomes (KPIs) stated in section 2.1 Telemarketing Services.
- 2) The vendor is required to give access to call logs and recordings as requested to UNHCR with no additional charges.
- 3) The vendor is required to provide quality control and to explain how the quality of telemarketing calls is done with call agents.
- 4) The vendor is required to describe their procedures regarding complaint management.
- 5) The vendor is required to provide a detailed description of the proposed model for the Telemarketing Services (staffing of dedicated team, full-time or part-time, shared workload, etc.), as part of this proposal and implement it accordingly.
- 6) The vendor is required to provide training with daily monitoring to its agents and keep their knowledge up to date.
- 7) The vendor is required to comply with Personal Information Protection Acts and explain in their proposal how this is handled at the agency level.
 - a) The vendor is required to describe their procedures in terms of these privacy laws and their compliance with UNHCR Data Privacy provisions and Korea data privacy regulations.

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- 8) The vendor is also required to perform daily & monthly reports including performance analysis on its services provided, and to generate recommendations on how to meet KPIs. This includes:
- a) Preparing and submitting high-level daily reports, a monthly report including performance analysis of Telemarketing Services.
 - b) Providing 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.

2.4 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.

2.5 Compliance with the Government Requirement

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.

2.6 Rejection and correction of work

During the project, the vendor shall supervise and promptly discontinue any activities which (i) do not conform to the requirement in this Terms of Reference, or (ii) do 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, at UNHCR's sole and absolute discretion, is 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.

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3 Content of the Technical Offer

Your offer shall be prepared in English or Korean. Your technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information. There is no set format for the technical offer, it can be pdf, word, ppt etc. Please make sure you include all requested information to ease to technical scoring process.

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 (1) *experience in the non-profit sector* and (2) *experience in the for-profit (private) sector*:

(1) Service provision experience in the non-profit sector:

Proven track record on the number of clients for telemarketing services currently underway and/or completed in the non-profit sector (i.e., in the charity sector).

(2) Service provision experience in the for-profit (private) sector:

Proven track record on the number of clients for telemarketing services currently underway and/or completed in the for-profit sector (i.e., private 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 Section 2 Requirements*; (2) *your company's capacity and strategy to achieve the proposed results*:

- The provision of services listed under Section 2 Requirements
- A description of your organization's capacity and strategy to provide the service in the Terms of References and achieve the estimated results.
- The following samples are to be provided:
 - ✓ One (1) sample report for daily report
 - ✓ One (1) sample report of monthly report including performance analysis

3.3 Personnel Qualifications

The composition of the dedicated team you propose to provide, including operation managers and call agents. In particular:

- 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;
- Describe the managers' experience and expertise including non-profit and international organizations.

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).

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3.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing this document (Annex E) and including it in your submitted technical proposal.

3.6 Applicable Special Data Protection Conditions

Please also indicate your acknowledgement of the UNHCR Special Data Protection Conditions by signing this document (Annex D) by signing the annex.

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4 Evaluation

4.1 Technical Evaluation

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

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 15 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 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 and years of work.</p>
Service provision experience in the for-profit (private) sector (max 5 points)	<p>Please list your clients for telemarketing services currently underway and/or completed in the for-profit sector (i.e., private sector).</p> <p>The scores will be allocated to the number of clients.</p>
Proposed Services (max 40 points)	Documents and information to be provided to establish compliance with the set criteria
Telemarketing Services listed under section 2.1 (max 20 points)	<p>A description of your company strategy to offer Telemarketing Services as described under section 2.1.</p> <p>The scores will be allocated based on the comprehensiveness and the quality of the strategy proposed</p>
Compliance with standards and services listed under section 2.2 (max 10 points)	<p>A comprehensive proposal is presented by addressing requirements under section 2.2.</p> <p>The scores will be allocated based on the comprehensiveness and compliance.</p>
Compliance with operations management services listed under section 2.3 (max 10 points)	<p>A comprehensive proposal is presented by addressing all requirements under section 2.3.</p> <p>Please include:</p> <ul style="list-style-type: none"> ○ one (1) sample report for daily results ○ one (1) sample report for monthly results including performance analysis <p><i>Please note that without samples, 0 points will be given.</i></p>
Personnel Qualifications (max 15 points)	Documents and information to be provided to establish compliance with the set criteria

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Experience and skills of a dedicated team who will work on UNHCR project. (max 15 points)	<p>Experience of core people who will work on UNHCR project. (Including experience with similar projects)</p> <p>The scores will be allocated based on the average years` of relevant experience of the core people.</p> <p>Please include:</p> <ul style="list-style-type: none"> • CV or bio of the people that will be assigned to UNHCR account (max half A4 page) <p><i>Please note that without the CVs, 0 points will be given.</i></p>
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Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal to be considered further in the financial evaluation process.

4.2 Financial Evaluation

UNHCR will pay fee for successful regular giving conversions of Upgrade calls, Reactivation calls, and Conversion calls mentioned in section 2.1, and seeks a vendor that can accept this fee structure. Accordingly, the vendor is expected to include in the Financial Offer (Annex B) achievable contact rates, conversion rates, and average amounts, along with the expected fee based on these figures.

The Financial Offer will use the following percentage distribution: 30% of the total score.

The maximum number of points (30) will be allotted to the lowest cost per responder offered in Annex B. All other offers will receive points in inverse proportion to the lowest cost per responder.

The financial offer is to be submitted ONLY by filling in Annex B. No other format will be accepted.

UNHCR is exempted from all direct taxes, with this regard the price must be given without any local taxes. Please use KRW currency to provide your fee structure and sum up the total cost. Please fill in, sign, and company stamp of the Financial Offer for your price proposal. Your Financial Offer must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection.

Payment Method

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