

## **ANNEX A: TERMS OF REFERENCE**

**RFP/24/011/NETHERLANDS/PSP**

**Request for proposal for donor care services via inbound and outbound telemarketing 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](mailto:galer@unhcr.org).  
The deadline for receipt of questions is **10<sup>th</sup> of May 2024 h. 23:59 pm CET**.

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## INTRODUCTION

### Background

The Private Sector Partnerships team in the Netherlands is part of UNHCR Global Private Sector Partnerships Section, with a commitment to inspire awareness and approach the local community to feel part of UNHCR's mission and attract individual donations and persons committed to long-term monthly contributions. To support this, UNHCR NL is calling for proposals from qualified in-country external providers for the provision of donor care through inbound and outbound telemarketing and back-office donor care services.

In accordance with the international UNHCR PSP strategy, the PSP NL unit is responsible for raising funds from the private sector against agreed income and expenditure plans. To achieve the planned results the team employs a range of fundraising techniques and promotional campaigns to increase the donor base and supporter engagement with UNHCR. Fundraising activities in the Netherlands include two main programs: Individual Giving (IG), raising money from individuals both regular and one-off and Private Partnerships & Philanthropy (PPH) targeting companies, foundations, and High Net Worth individuals.

### Statement of Purpose & Objectives

UNHCR Private Sector Partnerships (PSP) Netherlands is seeking to appoint qualified service providers, offering donor care through inbound and outbound telemarketing and back-office donor care to support our fundraising and communication activities in the Netherlands.

PSP Netherlands might consider appointing a back-up supplier as well in case the main service provider fails to perform or might encounter capacity issues. In case the primary service provider fails to perform then the back-up will be activated.

The UNHCR PSP team in the Netherlands is currently looking to identify a competent in-country external providers for the provision of donor care services for two (2) years plus one (1) year extension upon satisfactory performance, tentatively from June 2024:

- Phase 1 - 1st of June 2024 – 31<sup>st</sup> of May 2025
- Phase 2 - 1st of June 2025 – 31<sup>st</sup> of May 2026
- Phase 3 - 1st of June 2026 – 31<sup>st</sup> of May 2027

### Pre-selection criteria

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: <ol style="list-style-type: none"> <li>1. Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent*</li> <li>2. Vendor registration form to be filled out and submitted (Annex F)*</li> </ol>
UNHCR Data protection	Compliance with UNHCR data protection clause, acceptance of Annex D.
UNHCR general terms and conditions	Compliance with UNHCR general terms and conditions, acceptance of Annex E.
Fluency in Dutch	Confirmation on your technical proposal that for all operators working on this project agents are fluent in Dutch.

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*\* 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.*

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### **Joint venture, subcontracting**

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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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## REQUIREMENTS

### Inbound telemarketing services

- Incoming donor retention call; donor services via incoming call including donor save (retention)
- To provide high quality donor services which entails a consistent approach, a listening ear for every donor who calls with the aim of strengthening the relationship with UNHCR, solution-orientedness, and the objective that every caller leaves the contact with a positive image of UNHCR.
- To answer the UNHCR Donor phone number for calls with questions, changes, cancellations and complaints.
- To retain as many donors as possible for the highest yearly value
- Check and review general donors' data collected during phone calls (per check), in Salesforce database.

### Outbound telemarketing services

- Outbound donor retention call, donor services outbound donor retention call
- To retain as many donors as possible for the highest yearly value of cancellations received via email and letter to donor care
- To provide high quality donors services which entails a consistent approach, a listening ear for every donor who calls with the aim of strengthening the relationship with UNHCR, solution-orientedness, and the objective that every caller leaves the contact with a positive image of UNHCR.

### Back-office services

- During peak periods (October-February) providing high quality back-up assistance to the Donor Care department of UNHCR including:
- Processing all emails and letters with donor cancellations so that these can be followed up by outbound donor retention calls
- Processing all emails and letters with changes to donor information
- Processing returned post
- Provide high quality donors services which entails a consistent approach, a listening ear for every donor who calls with the aim of strengthening the relationship with UNHCR, solution-orientedness, and the objective that every caller leaves the contact with a positive image of UNHCR.

### Objectives and volume for in & outbound campaigns

Please note: the below numbers are UNHCR PSP Netherlands' estimations based on its annual plan for three years. The fundraising operation expects a 25% market growth each year. Agencies are also requested to indicate in their bids their maximum capacity and availability, as well as to give feedback on the expected percentages and KPI's to get a realistic indication, even if these differ from UNHCR's requirements. In addition, the agencies are also required to present their overall strategy for delivering their telemarketing services.

#### Important notes:

Effective call: all calls where the caller and agent have spoken.

Service calls: effective calls not concerning the cancellation of a regular donation.

Retainable donors: all donors that indicate they want to cancel their regular donation excluding cancellation due to passing away.

Calls from retainable donors: all effective calls excluding service calls and calls regarding cancellation due to passing away.

Donors saved rate (in numbers): Number of donors that continue their regular donation (monthly, quarterly, half yearly or yearly) divided by the number of calls from retainable donors.

Donors saved rate (in value): Total yearly value of previous donation amount divided by new total yearly value of donation amount

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Campaign	Expected volumes + donors per year	Expected outcomes (KPIs)
Donor services: incoming call including donor save (retention)	4.500 then 25% expected market growth each year	1. 90% of calls handled within opening hours 2. 75% of calls answered within 40 seconds 3. 95% of calls answered within 1 minute 4. Minimum of 25% donors saved (in numbers) 5. Minimum of 35% donor value saved 6. Donor information is up to date in the Dutch UNHCR database.
Donor services: outbound donor retention call	4.500 then 25% expected market growth each year	1. 90% of donors reached withing 1 week 2. Minimum of 15% donors saved (in numbers) 3. Minimum of 35% donor value saved 4. Donor information is up to date in the Dutch UNHCR database.
Donor Services: Back Office donor care	2.000 emails per month then 25% expected market growth each year 8.000 returned post for period of required services	1. Ensure follow-up to donor of e-mail / letter within 72 hours (about 3 days) of receipt 2. Donor information is up to date in the Dutch 3. Processing of returned post within 2 weeks of receipt.

### Standard Service Requirements

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

1. All agents need to be fluent in Dutch;
2. Minimum requirement: Working hours 9:00-17.00 (Mon-Fri)
3. Answering machine with message to call back later (9:00-17.00 (Mon-Fri): when call center closes, from 17.00-9:00 (Mon-Friday) and from 17:00 (Friday) – 9:00 (Monday)\*.
4. 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);
5. Salesforce compliant;
6. Technical capacity: a) average of monthly calls able to manage, b) maximum volume of monthly calls able to manage, and c) percentage of managed calls within the first 20 seconds;
7. Reports, statistics and key performance indicators on the activity (please specify in daily, weekly, monthly);
8. Analyses that can be done by agency; please specify types of analyses and tools used;
9. Sending emails to donors;
10. Outbound calls taking place with caller ID;
11. Calls requiring special feedback to be redirected to UNHCR;
12. Human resources involved in the services must be recruited and trained to acquire 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;
13. 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.

### Operation Management

Agencies are also required to include the following (if applicable) in their proposals:

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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 inbound and outbound telemarketing calls is done with front-lines telemarketers.
  - 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, 'bel-me-niet register' uploads, 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 results;
  - b. Provide reports to measure key performance indicators (KPIs);
  - c. 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
  - d. Arrange quarterly face-to-face meetings with UNHCR.

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### **Performance of Work**

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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.

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### **Compliance with the Government Requirement**

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

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## CONTENT OF YOUR PROPOSAL

**Please fill out Annex B as your technical offer.**

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

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### 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.

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### 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.

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### Personnel qualifications and experience

Please describe the composition of the team assigned to UNHCR: telemarketing agents and the team leader(s). It is essential for UNHCR to have a list on the the number of the years your company's staff have been on board to assess the turnover rate and to ensure contingency. Please add this information accordingly.

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### Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex D) on your technical response form.

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### 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) on your technical response form.

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### 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 F).



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## EVALUATION

Only offers compliant with the pre-selection criteria will be considered for evaluation, please refer to clause 1.4.

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 score of the technical evaluation 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.

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	<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 strategy via inbound and outbound campaigns (25 points)	<p>A description of your company strategy to offer calling services for donor retention via inbound and outbound campaigns to achieve or even exceed the planned objectives.</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 2.3 back-office services, 2.4 Standard service requirements and 2.5 Operation Management (20 points)	<p>Comprehensive proposal presented by addressing all requirements under 2.4 for Operation Management &amp; Supervision, human relations and Quality Control &amp; Analysis and Reporting. The following samples are to be sent:</p> <ul style="list-style-type: none"> <li>✓ one (1) sample report for daily result</li> <li>✓ one (1) sample report of result summary</li> <li>✓ one (1) performance analysis report</li> </ul> <p><i>Please note that without the samples provided 0 points will be allocated.</i></p>
Personnel Qualifications (max 10 points)	Documents, information to be submitted to establish compliance with the set criteria
Team structure and retention (max 10 points)	<p>Please describe the composition of the team assigned to UNHCR to present the number of telemarketing and the team leader(s).</p> <p>It is essential for UNHCR to have a list on the number of the years your company's staff have been on board to assess the turnover rate and to ensure contingency. Please add this information accordingly.</p> <p>The scores will be allocated based on the average years` of the core people working with your company.</p>

## Financial Evaluation

Please fill out Annex C as your financial offer.

The Financial offer will use the following percentage distribution: 30% from the total score.

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The maximum number of points (30) will be allotted to the lowest total price calculated based on the prices offered on Annex C. All other offers will receive points in inverse proportion to the lowest price. Only Annex C can be used for financial proposals.

For fair and transparent financial comparison, the calculation will be based on the unit prices (fees payables) listed on Annex B and UNHCR PSP Netherlands volume estimation, based on experience. Please note that the below volume is not a financial commitment towards the winning company. The actual payments will be based on the hourly rate based on effective calls.

Volume estimation:

	Year 1	Year 2	Year 3
Inbound calls	750	938	1,172
Outbound calls	750	938	1,172
Back-office (emails)	24,000	30,000	37,500
` +25% volume increase added from year 2 onwards			

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## KEY PERFORMANCE INDICATORS

UNHCR will monitor the performance of the supplier who will be awarded a contract as described below:

Campaign	Expected volumes + donors per year	Expected outcomes (KPIs)
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## 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.