

Annex A: Terms of Reference  
2016/HCR/HKG/RFP/10041  
TELEMARKETING SERVICES IN HONG KONG SPECIAL ADMINISTRATIVE  
REGION (Hong Kong SAR) OF CHINA

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to [chiho@unhcr.org](mailto:chiho@unhcr.org). The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 12<sup>th</sup> of December 2016.

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# 1 Introduction

## 1.1 Background

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 on the basis of their needs and irrespective of their race, religion, political opinion or gender. In all of its activities, UNHCR pays particular 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.

## 1.2 Statement of Purpose & Objectives

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 Service 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 so as to raise fund to support UNHCR's global refugee work.

UNHCR Sub-Office Hong Kong is soliciting firms with expertise in telemarketing for fund raising and personnel to provide high quality services for contacting UNHCR donors, explaining UNHCR work, asking donors to strengthen donation support (e.g. increasing monthly donation amount), record and analyse response, feedback and result, and process follow-up procedures based on UNHCR requirements – hereinafter referred to as the "Project". The firm selected ("Vendor") must have the ability to provide the full-range of services to deliver output enhancing significant increase of donation. The vendor must prepare, carry out, and transfer all records to UNHCR in absolute confidentiality, and also taking care of data privacy in a professional manner.

The Frame Agreement will be signed with the successful bidder as follows:

**Three-year Telemarketing Services:** tentatively from March 2017 until February 2020

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

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## 2 Requirements

### 2.1 Requirements for Telemarketing Services

#### 2.1.1 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 to achieve 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

#### 2.1.2 Training & Staff Deployment

- The Vendor shall develop suitable materials for outbound and inbound 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 are allowed to participate in this project. The operational expenses incurred for training tele-marketers should be at the cost of the Vendor;

#### 2.1.3 Telemarketing Campaign Management

##### 2.1.3.1 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 in order 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)



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Campaign	No. of Campaign	Data Size (per campaign)	Contact Rate	Conversion /Successful Rate	Duration	Definition of Successful
Credit Card Debit Fail <sup>a</sup>	36	350-500 <sup>b</sup>	65-75 %	40-50 %	10 days	Able to obtain new credit card account or donor agreed to refill debit fail in past month(s)
Bank Autopay Debit Fail <sup>a</sup>	36	350-500 <sup>b</sup>	65-75 %	25-35 %	10 days	Able to obtain new bank account or credit card account or donor agreed to refill debit fail in past month(s)
One-time Conversion	36	100-200 <sup>b</sup>	65-75%	6-10%	10 days	Donor agreed to donate monthly  One-time donation is excluded
Special Appeal	6	5000 <sup>b</sup>	65-75%	30-40%	2 months	Donor agreed to donate a minimum one-time donation of HK\$500
New Donor Upgrade	32	400-600 <sup>b</sup>	65-75 %	30-40%	15 days	Donor agreed to increase donation with the "ask amount" provide by UNHCR  One-time donation is excluded
Annual Upgrade	3	8,000-10,000 <sup>b</sup>	65-75 %	25-35 %	2.5 months	Donor agreed to increase donation with the "ask amount" provide by UNHCR  One-time donation is excluded
Lead Conversion (Multi-channel)	18	2,000 <sup>b</sup>	50-60 %	6-10%	1 month	Donor agreed to donate monthly  One-time donation is also accepted (minimum HK\$500) but the unit cost should be lower than that of monthly donation
Lead Conversion (Digital)	9	4,000 <sup>b</sup>	50-60 %	6-10%	1.5 month	Donor agreed to donate monthly  One-time donation is also accepted (minimum HK\$500) but the unit cost should be lower than that of monthly donation
Reactivation	6	3,500 <sup>b</sup>	50-60 %	8-12 %	1.5 month	Donor agreed to donate monthly again

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Ad Hoc Emergency Appeal <sup>c</sup>	6	5,000-10,000 <sup>b</sup>	70-80%	40-50%	1 month	Donor agreed to donate monthly and/or donate a minimum one-time donation of HK\$500
Donor Satisfaction Call	36	2000 <sup>b</sup>	75-85%	50-60%	1 month	The whole script presented or survey filled

**Notes:**

- a) Campaign on monthly basis, data will be ready on around 28<sup>th</sup> of each month for both credit card and bank autopay
- b) This is a best estimation, we do not expect vendor to change the unit price if the quantities vary
- c) The Vendor is expected to have the flexibility and capacity to handle ad hoc campaign in a timely manner if any

**Credit Card Debit Fail**

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

**One-time Conversion**

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

**Special Appeal**

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

**New Donor/Annual Upgrade**

To call existing monthly donors and request them to increase their monthly donation amount

**Lead Conversion (Multi-channel/Digital)**

To call public who has provided their contact to us and appeal them to be UNHCR monthly donor

**Reactivation**

To call donors who has cancelled their monthly donations and appeal them to re-join as monthly donors

**Ad Hoc Emergency Appeal**

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

**Donor Satisfaction Call**

To call donors for donor satisfaction purpose e.g. donor survey, loyalty call etc., no donation ask during the call

Vendor should also take note when making the quote

- 1) 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;

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- 2) 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;
- 3) 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;
- 4) Donors may request tele-marketers to send donation form to register new donation instead of phone confirmation, so the Vendor is requested to send one A4 page letter together with the donation form to donors. UNHCR will provide letter content, letterhead, window envelope and donation form to vendor. Lettershop and postage will be under the cost of the Vendor;
- 5) 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;
- 6) The schedule and number of campaigns subject to UNHCR confirmation and will be defined in Purchase Order for each year.

### **2.1.3.2 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 staff could be working for this Project on a full time or part time (shared workload) basis. Whichever is the arrangement, the Vendors needs to provide the information clearly in the proposal and implement accordingly
- Provide telemarketing script for individual campaign
- Elaborate measures to be taken to ensure UNHCR donor data are treated in the strictest confidence and compliance with Personal Data (Privacy) Ordinance of Hong Kong and Annex G

### **2.1.3.3 Supervision and Quality Control**

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

### **2.1.3.4 Operation & 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

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## **2.2 Additional requirements**

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- eDM service, create eDM in HTML format to follow up with donors if necessary
- IDD service if necessary
- Mailing service, includes printing, lettershopping and postage to follow up with donors if necessary
- The Vendor is expected to be able to meet the pre-set timelines

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### ***2.3 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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### ***2.4 Compliance with the Government Requirement***

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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.

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### ***2.5 Rejection and correction of work***

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During the course of the Project, the Vendor shall supervise and promptly discontinue any activities which (i) does not conform to the requirement in this Terms of Reference, 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.

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### ***2.6 Customer Responsibilities***

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- Donor data will be provided by UNHCR at least two working days prior program launch;
- Printing materials such as letterhead, envelope and donation will be provided by UNHCR if necessary;



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### 3 Content of the Technical Offer

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

#### 3.1 Company Qualifications

A description of your company with the following documents: company profile, registration certificate and last audit reports:

- Year founded;
- If a multi-location company, specify headquarters location, as well as location (s) and registration date(s) of your local office(s) in Hong Kong.
- Number of similar and successfully completed projects;
- Number of similar projects currently underway;
- Total number of clients your company currently services in Hong Kong as well as elsewhere and their identities;
- Client references

Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

Please note that any relevant experience working with UNHCR or other UN Agencies or other NGOs are deemed essential technical criteria.

#### 3.2 Proposed services

A description of your organization's capacity to provide the service:

- Proposed work approach and deliverables, quality of the technical response to the requirements as stipulated in the TORs Section 2.

A description of your organization's experience in providing these services:

- Provide minimum of three client references and include the Name of the Contact Person, Title and Contact information
- Please advise if your company is working or has worked with:\*
  - a) Another UNHCR office or any other UN organization;
  - b) In the public sector;
  - c) Government; or
  - d) In a UNHCR environment/ work setting

\*If yes, please provide UNHCR with the Name of the Contact Person and Contact Information in your Technical Offer, even if s/he is not one of your three references.

If you are planning to work with subcontractors or consultants to provide the required services, please provide their names and include three references for each consultant and/or subcontractor.

#### 3.3 Personnel Qualifications

The composition of the team you propose to provide, including project managers, paid staff, subcontractors, consultants. In particular:

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- 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 their experience and expertise including in working with UN and/or not for profit international organizations;
- Indicate availability of resources (number of staff, supervisors, and/or project Manager)

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### **3.4 Vendor Registration Form**

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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**

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Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

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## 4 Evaluation

### 4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

Category	Criteria
1. Company Qualifications (15%)	<ul style="list-style-type: none"> <li>• General liability/ capacity of the company (5%)</li> <li>• Relevant sector experience and experience in not for profit and/or UN (5%)</li> <li>• Previous relevant projects executed (5%)</li> </ul>
2. Proposed Services (35%)	<ul style="list-style-type: none"> <li>• Comprehensiveness of proposal (7%)</li> <li>• Clarity interpreting and presenting telemarketing management services (7%)</li> <li>• Types of analysis and performance reports (7%)</li> <li>• Quality/ creativity of proposed services (7%)</li> <li>• Quality/ creativity of other services (including third party services if applicable) (7%)</li> </ul>
3. Project staff (20%)	<ul style="list-style-type: none"> <li>• Experience of core people who will work on project (including experience with similar projects, and not for profit/UN experience) (20%)</li> </ul>
<b>Total:</b>	<b>70%</b>

The technical offer will be evaluated using the above criteria and percentage distribution: 70% from the total score. Bidders must have a minimum technical threshold of 49 out of 70 points for the technical proposal in order to be considered further for the financial evaluation.

The maximum number of points that can be awarded per criteria is 5 points on a rating scale of 0 to 5 when 5 is the highest as per below overview:

Excellent	5	Excellent evidence of ability to exceed requirements
Good	4	Good evidence of ability to exceed requirements
Satisfactory	3	Satisfactory evidence of ability to support requirements
Unsatisfactory	2	Unsatisfactory evidence of ability to support requirements
Poor	1	Marginally acceptable or weak evidence of ability to support requirements
No submission	0	Information has not been submitted or is unacceptable

[Handwritten initials/signature]

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## 5 Key Performance Indicators

### 5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected vendor.

- Fulfill related requirements listed in Section 2
- Achieve timelines and KPIs listed in Section 2.1.3.1

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