



**ANNEX A: TERMS OF REFERENCE  
RFP/PSP/CANADA/2020/001  
FOR THE PROVISION OF TELEMARKETING SERVICES IN CANADA**

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to Erzsebet Gal at [galer@unhcr.org](mailto:galer@unhcr.org) cc Roger Llevat at [llevatr@unhcr.org](mailto:llevatr@unhcr.org) The deadline for receipt of questions is **11<sup>th</sup> of September (23:59 pm UTC -4)**.

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## 1 Introduction

### 1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the Agency has helped tens of millions of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian Agencies. Its staff of more than 17,000 personnel is helping more than 79 million people in 135 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see <http://www.unhcr.org>.

#### 1.1.1 Private Sector Partnership Service (PSP) in Canada

The primary purpose of the Private Sector Partnership Service (PSP) in UNHCR Canada is to generate income from individual donors, corporates and foundations, in order to support UNHCR activities worldwide. PSP activities in Canada include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Philanthropy (PPH) seeking support from companies, foundations, small and medium sized enterprises (SMEs) and High Net-Worth individuals.

UNHCR Canada is rapidly growing its fundraising program, with active acquisition programs for new monthly and one-time donors. We have a file of approximately 15,000 active monthly donors and 35,000 single gift donors. In order to support our acquisition and retention efforts we are looking to increase the use of outbound telemarketing and affiliated services, from which we have historically seen positive return on investment. Telemarketing is to be used to convert warm OTG leads to RG donors, to retain and upgrade monthly donors and to steward donors on our file. The office is now opening this RFP to recruit agencies to provide outbound telemarketing fundraising and affiliated services in Canada.

### 1.2 Statement of Purpose & Objectives

The purpose of the present RFP is to establish a Long-term Agreement (LTA) with **qualified telemarketing** agencies to support PSP Canada in the recruitment and retention of donors. PSP Canada will appoint a main and a back-up service provider to ensure business continuity.

The contract phase is planned from January 2021 to December 2025 (five-years) subject to satisfactory performance. The successful bidder will be requested to maintain their quoted price model for the duration of the contract.

UNHCR expects the winner of this request for proposal (RFP) to be able to provide services from January 1st, 2021 onwards.

Agencies are expected to provide the services as described under point 2 – requirements. The corresponding technical proposal needs to follow the structure of point 2- requirements.

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## 2 Requirements

**Please note:** these numbers are UNHCR Canada’s estimations based on its annual plan for three years. The fundraising operation expects an approximately 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 in order to get a realistic indication, even if it is different from UNHCR’s requirements. In addition, the agencies are also **required** to present their overall strategy for delivering their telemarketing services.

The primary service delivered will be telemarketing but UNCHR Canada employs a multi-channel discipline with all donor contacts. The agency is expected to be able to provide SMS services as well as affiliated mailing (pledge letters, non-contact mailing packages) in association with calling. These affiliated services can be carried out through third-partner agencies if the management is through the telemarketing agency.

Campaign	Details	Target	Expected volumes + donors per year	Expected outcomes (KPIs)
1. Welcome call new OTG donors	-To thank and welcome new donors for their sign up, record any feedback from the donor, and verify and correct donor information	New OTG donors (within 2- 4 weeks of gift) \$30-\$500 = 1. From online 2. From direct mail 3. From DRTV  New Face to Face donors is excluded from this calling	4,000 per year, with 50% of volume in Q4  This is a best estimation then 25% expected market growth each year	1. 60% effective contact rate on the provided list.  2. Donor information is up to date in the database, missing information is collected  3. 5% targeted conversion to monthly donor
	-To convert new donors to join the monthly giving program at an appropriate level/for certain segments			
	-If donors cannot be reached after several attempts, and cellphone number is available, send out SMS			
2. Welcome call new monthly donors	-To thank and welcome new donors for their sign up, record any feedback from the donor, and confirm donor information	New Monthly donors (within 2-4 weeks of initial gift) \$1-\$50/month = 1. From online 2. From direct mail 3. From DRTV  New Face to Face donors is excluded from this calling	2,500  This is a best estimation then 25% expected market growth each year	1. 60% effective contact rate on the provided list.  2. Donor information is up to date in the database, missing information is collected
	-To verify and correct personal and payment information including monthly donation transaction date			
	-If donors cannot be reached after several attempts, and cellphone number is available, send out SMS			
3. Monthly Declines	-To remind monthly donors who have not been debited for several months due to failed or expired payment method. Verify personal and payment information in order to understand reason for	1. Monthly donors with failed transactions > 4 months (Outflows from Face 2 Face,	1500  This is a best estimation then 25% expected	1. 35% effective contact rate on the provided list  2. 50% targeted reactivation to

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	interruption and reactivate donation. -If donors cannot be reached after several attempts, and cellphone number is available, send out SMS If donors cannot be reached by phone or SMS, issue a mailing to verify personal and payment information and reactivate donation	online and others)	market growth each year	monthly donor on phone, \$22/average gift 3. 40% targeted contact rate through mailing 4. 1.25% targeted response rate through mail, \$22/average gift
4. Monthly Upgrade call	-To ask donors to increase their monthly gift amount. -If not reached, try to call up to multiple times -If still unreached, send out SMS -If donors cannot be reached by phone or SMS, issue a mailing	Monthly donors at 13-month mark - rolling program Monthly donors > 13 months who have not been contacted for an upgrade in 6 months	3500 This is a best estimation then 25% expected market growth each year	1. 35% effective contact rate on the provided list 2. 30% targeted conversion to monthly donor on phone, \$8/average gift increase 3. 40% targeted contact rate through mailing 4. 2% targeted response rate through mail, \$8/average gift increase
5. Monthly Reactivation calls	-To convert long lapsed monthly donors to monthly donors	To convert from lapsed monthly donors > 12 month to active monthly donors	1500 This is a best estimation then 25% expected market growth each year	30% effective contact rate 12% conversion rate, \$20/month average gift
6. Conversions calls	-To convert one-off donors into monthly donors	Active and recently lapsed one-off donations	5000 This is a best estimation then 25% expected market growth each year	1. 35% effective contact rate on the provided list. 2. 4% positive conversions, \$22/month average gift
7. Acquisition calls	- To convert existing UNHCR Canada leads into one-off and/ or monthly donors - To acquire additional phone numbers through append	Text to give leads Online leads (advocate,	15,000 leads	35% effective contact rate on the provided list

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		newsletter subscriber)		5.5% conversion rate, \$20/month average gift
8. Lead generation and acquisition calling	<ul style="list-style-type: none"> <li>- To create a pool of convertible leads using online sources (social media, online pledges, third party networks)</li> <li>- To acquire phone numbers through lead generation activity and/or append</li> <li>-To call leads and convert to one-off and/or regular donors</li> </ul>	Leads generated by TM agency or partner agency	12,000 leads  This is a best estimation then 25% expected market growth each year	40% effective contact rate on the provided list  8% conversion rate  \$22/month average gift  UNHCR expects to achieve the following minimal cumulative Return on Investment (ROI) on acquisition programs:  Year 1: 0.7 Year 2: 1.5 Year 3: 2.2  Cost per lead \$1.50-\$6
9. Misc. calling/testing	Ad hoc campaigns for purposes of testing. At times may require urgent set-up and availability from telemarketing agents who are familiar with UNHCR and would have received new training on the emergency. <ol style="list-style-type: none"> <li>1. Emergency campaign outbound calls</li> <li>2. Loyalty calls</li> <li>3. Legacy acquisition calls</li> </ol>	Outbound calls to selected segments, variable asks per campaign	1500  This is a best estimation then 25% expected market growth each year	KPIs to be defined per campaign

**Additional note:** The schedule and number of campaigns and records provided may vary and is subject to UNHCR's confirmation.

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

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## 2.1 Standard Service Requirements

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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 English or French. Language preference of donor to be provided with data files where available. Estimated 5% of file French speaking;
2. Working hours 11:00-23:00 (Mon-Fri)<sup>1</sup>; and desired: 9:00-13:00 (Sat)\*;
3. Agents to recording credit card and debit donations into UNHCR online donation form;
4. Preparation of export/import formatted forms including donor data (the form is provided by UNHCR). Secure transfer of forms to UNHCR or database service vendor (currently Deloitte);
5. 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;
6. Ability to issue SMS when donors cannot be reached by phone and cellphone data is available;
7. Ability to mail packages when donors request to make a pledge in the mail or if they cannot be reached on the phone. Ability to assist UNHCR with creation of mail packages for these purposes;
8. In conjunction with UNHCR Canada, development of high-quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues;
9. Provision of all human relations activities related to staffing for UNHCR Canada's campaign including:
  - a. Plans and coordinates the recruitment of highly competent staff to effectively perform the activities as required under the UNHCR telemarketing program.
  - b. Provision of all staff administration, including but not limited to, employment contract, insurance coverage, remuneration, retirement benefits, and other benefits to staff members who have been recruited to support the telemarketing program. Agency must ensure employee benefits and compensation arrangements comply with the local legislation in Canada.
  - c. Monitors the attendance, performance and conduct of staff who are involved in the UNHCR telemarketing fundraising services.
  - d. Plans, develops and maintains motivation schemes as deemed appropriate;
  - e. Provision of an Account Manager(s) to serve as a focal point to oversee the effective implementation of the telemarketing program.

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## 2.2 Operation Management

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

1. The vendor is required to present their overall strategy for their telemarketing services.

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<sup>1</sup> These hours may vary and are indicative. Shifts should be performed in relation to regular telemarketing hours in Canada.

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2. The vendor is required to give access to call logs as requested to UNHCR with no additional charges. All call logs should be provided to UNHCR securely with all personal and financial information removed.
3. The vendor is expected to provide quality control and to explain how quality of outbound and 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 to train their staff and to participate at the induction training provided by UNHCR Canada. 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 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 Canadian regulations (DNCL)
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:
  - a. Prepares and submits high-level weekly reports, a monthly tracker and detailed quarterly reports of telemarketing results;
  - b. Provide reports to measure key performance indicators (KPIs) including but not limited to decision maker contacts, number of contacts, conversion rate, average donation, and return on investment.
  - c. Provide input into data selection for campaign
  - d. Provides reports to analyze the performance of testing strategies, segmentation analysis and introduction of new measures;
  - e. 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
  - f. Arrange quarterly face to face meetings with UNHCR

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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.



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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 Canadian 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.

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## 2.5 Other services

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UNHCR Canada would like to have the below services and the corresponding pricing only for information. Please provide feedback if your agency can provide the below services. Please kindly note that the below listed items are **not mandatory** and will not be evaluated during the technical and financial evaluation.

- The corresponding prices are to be confirmed in Annex B (Financial Offer Form).
- Suppliers can provide pricing based on the indicated unit measure

### Back Office Services:

1. Phone number appends (per phone number)
2. Check and review general donors' data collected during phone calls (per check)
3. Any other service (please add rows for additional services you could provide and also indicate the unit measure)

### Any Other Services:

1. Any other service that can be beneficial to improve UNHCR Canada's telemarketing service

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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:

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#### 3.1 Company Qualifications

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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) *general liability and capacity of the company*, (2) *telemarketing fundraising experience in the private (for profit) sector* (3) *relevant experience in the non-profit sector*.

- A description of your company with evidence of your company's capacity to perform the services required, including company profile and registration certificate to prove that company is authorized to work/ do business in Canada
- Please specify location of the company's headquarters, and the branches that will be involved in the project
- Total number of existing clients, please provide a list;
- Telemarketing experience in the private (for profit) sector.
- Telephone fundraising experience in charity (i.e. non-profit sector).
- Please provide three client references that UNHCR will contact for background check in case of selection

Please include any information that will facilitate our evaluation of your company's substantive reliability and capacity to provide the services.

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#### 3.2 Proposed Services

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During the technical evaluation, in this section, the panel will score (1) *the comprehensiveness of the proposal*; (2) *your company`s compliance regarding the required services listed under point 2*; (3) *your company`s capacity and strategy to provide the required services*.

- The comprehensiveness of the proposal, please make sure that your proposal follows the structure of this ToR and address all requirements clearly to ease the scoring. General company profile will not be accepted.
- The provision of services listed under section 2.1 Standard Service Requirements
- The provision of services listed under section 2.2 Operation Management
- A description of your organization's capacity and strategy to provide the service in the ToRs and achieve the estimated results. Including sample reporting flows and schedules.

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### **3.3 Personnel Qualifications**

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- Please outline the experience of core people who will work on UNHCR project, including experience with similar projects
- Please describe the composition of the team assigned to UNHCR
- Very short Curriculum Vitae of the core staff

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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) by signing each page. Please send it back with your technical offer.

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### **3.6 Special Data Protection Conditions**

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Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) by signing each page. Please send it back with your technical offer.

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### **3.7 Content of Your Financial Proposal**

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Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown.

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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 (on a 100 points scale, i.e. max 70 points obtainable for the technical offer).

Please find hereunder the detailed scoring breakdown:

<b>Company Qualifications (max 20 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process</b>
General liability and capacity of the company (max 5 points)	Please provide company registration certificate, company profile information and the number of current clients as a list.
Telemarketing experience in the private (for profit) sector (max 5 points)	The scores will be allocated for the <b>number of telemarketing projects</b> currently on-going and/and completed (in total) in the private sector.
Telemarketing experience in the charity (not for profit) sector (max 10 points)	The scores will be allocated for the <b>number of telemarketing projects</b> currently on-going and/and completed (in total) in the charity sector.
<b>Proposed services (max 40 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process</b>
Comprehensiveness of proposal (max 5 points)	Please follow the structure of requirements listed under point 2 to ease the scoring. General company profile will not be accepted as technical proposal. Please tailor your offer to demonstrate compliance with the listed requirements.
Compliance with the requirements listed under 2.1 Standard Service Requirements (15 points)	Comprehensive proposal presented by addressing all requirements under 2.1 for Project Set-up & Training & Staff Deployment & Telemarketing Campaign Management.
Compliance with the requirements listed under 2.2 Operation Management (15 points)	Comprehensive proposal presented by addressing all requirements under 2.2 for Operation Management & Supervision, human relations and Quality Control & Analysis and Reporting. The following samples are to be sent: <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> <b>Please note that without the samples provided 0 points will be allocated.</b>
Capacity to achieve the estimated results (max 5 points)	A description of your organization's capacity and strategy to provide the service in the ToRs and achieve the estimated results. Including sample reporting flows and schedules
<b>Personnel Qualifications (max 10 points)</b>	<b>Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process</b>

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Experience and skills of core team who will work on UNHCR project. (max 10 points)	The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.
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The minimum passing scores of the 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.

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#### **4.2 Financial Evaluation**

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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. Only Annex B can be used for financial proposals.

#### Payment Method

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

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## 5 Key Performance Indicators

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis.

Campaign	Expected outcomes (KPIs)
1. Welcome call new OTG donors	1. 60% effective contact rate on the provided list. 2. Donor information is up to date in the database, missing information is collected 3. 5% targeted conversion to monthly donor
2. Welcome call new monthly donors	1. 60% effective contact rate on the provided list. 2. Donor information is up to date in the database, missing information is collected
3. Monthly Declines	1. 35% effective contact rate on the provided list 2. 50% targeted conversion to monthly donor on phone, \$22/average gift 3. 40% targeted contact rate through mailing 4. 1.25% targeted response rate through mail, \$22/average gift
4. Monthly Upgrade call	1. 35% effective contact rate on the provided list 2. 30% targeted upgrade of monthly donor on phone, \$8/average gift increase 3. 40% targeted contact rate through mailing 4. 2% targeted response rate through mail, \$8/average gift increase
5. Monthly Reactivation calls	30% effective contact rate 12% conversion rate, \$20/month average gift
6. Conversions calls	1. 35% effective contact rate on the provided list. 2. 4% positive conversions, \$22/month average gift
7. Acquisition calls	35% effective contact rate on the provided list 5.5% conversion rate, \$20/month average gift

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8. Lead generation and acquisition calling	<p>40% effective contact rate on the provided list</p> <p>8% conversion rate</p> <p>\$22/month average gift</p> <p>UNHCR expects to achieve the following minimal cumulative Return on Investment (ROI) on acquisition programs:</p> <p>Year 1: 0.7 Year 2: 1.5 Year 3: 2.2</p> <p>Cost per lead \$1.50-\$6</p>
9. Misc. calling/testing	KPIs to be defined per campaign

\*Effective contact rate can be defined as 'talking to the specific donor and not i.e. leaving a message to a voicemail'.

Please note that budget allocation cannot be revealed by UNHCR at this point of time but will be disclosed to the successful telemarketing Agencies.

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## 6 CUSTOMER RESPONSIBILITIES

UNHCR Canada will be responsible for;

- Appointing a dedicated project manager;
- Providing training 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 input for content for the call scripts;
- 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.