

DATE: 24th OF AUGUST 2020

REQUEST FOR PROPOSAL: RFP/PSP/CANADA/2020/001

FOR THE ESTABLISHMENT
OF A FRAME AGREEMENT FOR THE PROVISION OF

TELEMARKETING SERVICES IN CANADA

CLOSING DATE AND TIME: 25TH OF SEPTEMBER 2020 – 23:59 pm UTC-4

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. The agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It also has a mandate to help stateless people.

In more than five decades, the agency has helped tens of millions of people restart their lives. Today, a staff of some 8,600 people in more than 125 countries continue to help more than 33.9 million globally displaced persons. To help and protect some of the world's most vulnerable people in so many places and types of environments, UNHCR must purchase goods and services worldwide. For further information on UNHCR, its mandate and operations, please see <http://www.unhcr.org>.

1. REQUIREMENTS

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.

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

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form an integral part of this RFP:

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 E: eTenderBox Registration Guide

2.2 ACKNOWLEDGMENT

We would appreciate your informing us of the receipt of this RFP by return e-mail to Erzsebet Gal, galer@unhcr.org as to:

- Your confirmation of receipt of this invitation to bid
- Whether or not you will be submitting a bid

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 Erzsebet Gal (Ass. PSP Officer) at galer@unhcr.org cc Roger Llevat (Snr. Supply Officer) at llevatr@unhcr.org. **The deadline for receipt of questions is the 11th of September (23:59 pm UTC -4).** 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 the corresponding Q&A file will be posted and sent to all bidders.

2.4 YOUR OFFER

Your offer shall comprise the following two sets of documents and to be submitted in English:

- Technical offer
- Financial offer

2.4.1 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 requirements under Annex A section 2.

a) **Company qualifications**

IMPORTANT: Please make sure your proposal is sent through your company's legal registered name and not the commercial or advertising name. The winner 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.

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.

b) Proposed services

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.

c) Staff qualifications, account management

- 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

d) Vendor Registration Form: If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (**Annex C**);

e) Please indicate your acknowledgement of the **UNHCR General Conditions of Contract for the Provision of Services (Annex D)** and include it in your submitted Technical Proposal.

f) Please indicate your acknowledgement of the **UNHCR Special Data Protection Conditions (Annex E)** and include it in your submitted Technical Proposal.

2.4.2 Content of the FINANCIAL OFFER

Your separate **Financial Offer** must contain an overall offer in CAD (Canadian Dollar)

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

You are requested to hold your offer valid for 90 days from the deadline for submission. UNHCR will make its best effort to select a company within this period. UNHCR's standard payment terms are within 30 days after satisfactory implementation and receipt of documents in order.

The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

2.5 BID EVALUATION:

2.5.1 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:

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

2.5.2 Technical and Financial evaluation:

Only offers compliant with the pre-selection criteria will be considered for evaluation. For the award of this project, UNHCR has established evaluation criteria which govern the selection of offers received. 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:

Company Qualifications (max 20 points)	Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process
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 number of telemarketing projects 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 number of telemarketing projects currently on-going and/and completed (in total) in the charity sector.
Proposed services (max 40 points)	Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process
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"> ✓ one (1) sample report for daily result ✓ one (1) sample report of result summary ✓ one (1) performance analysis report Please note that without the samples provided 0 points will be allocated.
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
Personnel Qualifications (max 10 points)	Documents, information to be submitted to establish compliance with the set criteria and to ease the scoring process
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.

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.

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; e.g. [total Price Component] x [lowest] / [other] = points for other supplier's Price Component.

2.6 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 for UNHCR applications. One supplier should have only one registered email account in the system. Therefore, the supplier must use only one 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. Registration Guide (Annex G) and Use Manual of eTenderBox (Annex F) are available at the above URL and attached this cover page.

IMPORTANT: The technical and financial offers shall be clearly separated by uploading them to the appropriate category in the system. 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. In order to ensure the safe submission of the full and final offer, it is recommended to have all files uploaded well before the tender deadline.

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2.7 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.

2.8 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

Any Purchase Order (PO) issued as a result of this RFP will be made in the currency of the winning offer(s). Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

2.9 UN GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES

Please note that the General Conditions of Contracts for the Provision of Services (**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,

Roger Llevat
Snr. Supply Officer for UNHCR Americas Region