



Annex A: Terms of Reference
RFQ/23/031/RBAP/PSP

Request for quotation for the provision of outbound telemarketing services for UNHCR
Private Sector Partnerships in Indonesia

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1 Introduction

1.1 Background

UNHCR, or the UN Refugee Agency, is a global organization dedicated to saving lives, protecting rights, and building a better future for refugees, forcibly displaced communities, and stateless people. UNHCR leads international action to protect people forced to flee their homes because of armed conflict, persecution, and human rights abuses. We deliver life-saving assistance like shelter, food, and water, and help safeguard fundamental human rights for persons of concern and find long-term solutions to ensure that those forced to flee from their homes can rebuild their lives in safety and dignity. We also work to ensure that stateless people are granted a nationality.

UNHCR has been working in Indonesia since 1979, when the Government of Indonesia invited UNHCR to assist with the establishment of a refugee camp on Galang Island to accommodate more than 170,000 refugees who had fled conflict in Southeast Asia.

The primary purpose of the Private Sector Partnership Service (PSP) in Indonesia is to generate income from individual donors, corporates, and foundations, to support UNHCR activities in Indonesia and worldwide. PSP activities in Indonesia started in 2020 and now include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Partnerships & Philanthropy (PPH) seeking support from companies, foundations focusing on Islamic Philanthropy and High Net-Worth individuals.

Within the Individual Giving strategy, PSP Indonesia primary objective is to continue increasing its donor base with high quality donors.

Face to face and Digital are the two main acquisition programs: Face to Face is mainly aiming at recruiting new regular donors, while digital acquisition is recruiting mainly one-off donors via UNHCR website third party crowdfunding platform, and lead generation. The objective of the Telemarketing services will be to engage with donors and convert one-time donors into regular monthly donors, convert leads into regular monthly donors, and upgrade the average donation of existing donors.

1.2 Statement of Purpose & Objectives

The UNHCR PSP team in the Indonesia is currently looking to identify qualified agency to provide telemarketing outbound services for outbound call service, for the period of 1 year, tentatively August 2023 – July 2024 with potential extension for a further period of one year, subject to satisfactory performance.

PSP Indonesia would like to identify qualified companies based on the following services:

1. **One Time Donors Conversion**
2. **New Leads Conversion**
3. **Upgrade Calls**

Supplier(s) will be requested to maintain their proposed pricing structure for the duration of the contract.

The objectives and expected outcomes from the programs are:

Program	Objectives	Expected Outcomes (KPIs)	Timeline
One Time Donors Conversion	To contact and convert one time donor into regular monthly donors.	<ol style="list-style-type: none"> 1. 50% Contact Rate 2. 8% Conversion Rate 	August 2023 – July 2024
New Leads Conversion	To contact and convert new leads into regular monthly donors	<ol style="list-style-type: none"> 1. 50% Contact Rate 2. 15% Conversion Rate 	August 2023 – July 2024
Upgrade Calls	To contact and upgrade (increase donation value) from their monthly donations.	<ol style="list-style-type: none"> 1. 50% Contact Rate 2. 30% Agree Rate 	August 2023 – October 2023

Please note: the KPIs are based on UNHCR PSP Indonesia current performance. 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.

2 Requirements

2.1 Telemarketing donor conversion services for outbound calls

Important notes:

- Contact rate can be defined as the proportion of calls with a decision maker where the decision maker decides they will or will not accept our offer.
- Agree rate in upgrade calls can be defined as the proportion of contacts that accepted to increase their monthly donation during the call/number of effective calls
- Agree rate in one time donors' conversion and new leads conversion can be defined as the proportion of contacts that accepted to pledge monthly donation during the call/number of effective calls
- Conversion rate can be defined as the proportion of contacts that make donation payment after contacted

The following are the services required of the agency.

Program	Details	Target audience	Expected volumes + donors per year	Expected outcomes (KPIs)
1. One Time Donors Conversion	To convert one-time donors into regular (monthly) donors	1. One time donor from digital platform in UNHCR donation page 2. One time donor from digital platform in Crowdfunding Donor e.g., Kitabisa.com 3. Other sources	5000 donors	50% of Contact Rate, and 8% of Conversion Rate
2. New Leads Conversion	To contact and convert new leads into regular monthly donors (or one-time donors)	1. Social media ads 2. Website leads 3. Offline leads 4. Other sources	12,000 leads	50% of Contact Rate, and 15% of Conversion Rate
3. Upgrade Calls	To contact and upgrade monthly donations of existing donors	Existing donors (regular donors)	3600 donors	50% of Contact Rate, and 30% of Agree rate

Additional note: Volumes indicated are our best estimates based on the knowledge we have to date and are subject to change. The schedule and number of campaigns and records provided may vary and are subject to UNHCR's confirmation. Volumes indicated may not represent the final volume of the program.

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 based on the possibilities of the current operation and history of the supplier. However, recommended strategies to meet the proposed targets should be clearly outlined in the proposals.

2.2 Standard requirements for outbound services

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 Bahasa.
2. Working hours 9:00-18:00 (Mon-Fri); and if needed 9:00-18:00 (Sat).
3. Agents to direct and assist donor to properly fill donation detail on UNHCR Indonesia Donation Web.
4. Ability to handle donor questions about UNHCR campaigns, and objections.
5. In conjunction with UNHCR Indonesia, agency will work together to develop high quality scripts that are timely and relevant to existing UNHCR campaigns and media coverage of relevant issues.
6. Provision of all human relations activities related to staffing for UNHCR Indonesia' campaign including:
 - a. Planning and coordinating 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 Indonesia.
 - c. Monitoring of the attendance, performance and conduct of staff who are involved in the UNHCR telemarketing fundraising services.
 - d. Planning, development, and maintenance of 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.
7. Dedicated room for agents and supervisor
8. Agents or supervisors can be recommended or selected by UNHCR in recruitment

2.3 Operations management for outbound services

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

1. The vendor is required to present their overall strategy, campaign planning for their telemarketing services.
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-line telemarketers.
 - a. In addition, the vendor is also expected to describe their procedures regarding complaint management.
4. The vendor is required to propose the number of trainers and front-line telemarketers for this project to train their staff and to participate at the induction training provided by UNHCR Indonesia. 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 with daily monitoring 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 UNHCR Data Privacy provisions and Indonesia data privacy regulations.
6. The vendor is also required to perform weekly report, 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. Preparing and submitting high-level weekly reports, a monthly tracker, and detailed reports of telemarketing results; provision of Live dashboards in PowerBI or equivalent tool would be a strong asset.
 - b. Providing 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. Providing input into data selection for campaign
 - d. Providing reports to analyze the performance of testing strategies, segmentation analysis and introduction of new measures.
 - e. Providing a verbal report of any misconduct or complaint received in regard to 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. Arranging monthly meetings with UNHCR (virtual or in person)

2.4 UNHCR Responsibilities

UNHCR is responsible for:

- Working with the selected agency to develop a full project brief.
- Preparing a periodic/quarterly Statement of Work (SOW) to specify project requirements and timelines, and budgets.
- Providing training about UNHCR's operations 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, efficiently, and securely.
- Providing input for content for the call scripts.
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROI's to ensure high level results.
- Streamlining reports submitted by the agency with UNHCR database reports and letting agency know of any required adjustment to reported figures.
- Arranging regular meetings on progressions and deliverables of activities.

UNHCR Assets

During project onboarding, UNHCR will share the following assets to the selected contractor:

- Brand Book
- Communicating How UNHCR Protects
- Telemarketing scripts by campaign and other supporting documents.

3 Content of your offer and evaluation

3.1 Technical Evaluation

Please fill out Annex B technical response form to submit with your proposal.

The evaluation will be based on a pass/fail (Yes or No) method. Your proposal should be in English and must be compliant with all the below listed criteria to be considered as compliant:

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Acceptance of UNHCR General Conditions of Contract for the Provision of Services	Please sign Annex D and submit with the technical response form.
Compliance with data protection	UNHCR special data protection clause is to be accepted (Annex E). Please send the signed document with your technical proposal.
Locally based	Your company must have a local office in Indonesia and your company must be authorized to work / do business in Indonesia. To establish compliance with this criterion, your company registration certificate is to be submitted with your offer. Please specify location of the company's headquarters, and the branches that will be involved in the project on Annex B.
Relevant experience in telemarketing services	Proof of at least 3 years of providing telemarketing services for profit or nonprofit sector. To establish compliance with this criterion, your company registration certificate is to be submitted with your offer and indicate the year of founding on Annex B.
Company qualification in terms of similar project(s) in Indonesia	Please describe at least one (1) telemarketing project with fundraising purposes your company has been managed or has completed in the past two years. If possible, please add the indicative results.
Non-profit clients in Indonesia	Your company must have at least one (1) charity client (current or previous) in Indonesia from the past year. Please list your clients on Annex B.
Availability of dedicated personnel with relevant experience	Your company must offer the following core staff for UNHCR fundraising telemarketing programs with years of experience: <ul style="list-style-type: none"> • 2 years for Telemarketing Supervisor • 1 year for frontliners/telemarketers Please provide short biographies of the key professional staff (maximum half page) who will be working on the account with a clear indication of the number of years of relevant work experience they have.

3.2 Financial Evaluation

UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes. Please use single currency (IDR) to provide your fee structure and sum-up the total cost for the Services. Please fill in, sign and company stamp of the Financial Quotation (**Annex C**) for your price proposal.

Your Financial Quotation must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection.

The Financial Quotation (**Annex C**) and only this document will be evaluated based on the lowest total pricing offered.

3.3 *Applicable General Conditions*

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

3.4 *Applicable Special Data Protection Conditions*

Please also indicate your acknowledgement of the UNHCR Special Data Protection Conditions by signing this document (Annex E) and including it in your submitted technical proposal.

3.5 *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).

Please note that the contract will be awarded to the technically compliant, lowest price bidder.

4 Key Performance Indicators

4.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier.

Campaign	Expected outcomes (KPIs)
1). Conversion One Time Donors 2). Leads Conversion 3). Upgrade Calls	1) Convert One Time Donors <ul style="list-style-type: none"> • Convert one time donor into regular monthly donors, meeting the following targets: <ul style="list-style-type: none"> ○ 50% Contact Rate ○ 8% Conversion to Regular Donor 2) Convert New Leads <ul style="list-style-type: none"> • To contact and convert new leads into regular monthly donors, meeting the following targets : <ul style="list-style-type: none"> ○ 50% Contact Rate ○ 15% Conversion rate 3) Upgrade Calls <ul style="list-style-type: none"> • To contact and upgrade monthly donations of existing donors <ul style="list-style-type: none"> ○ 50% Contact Rate ○ 30% Agree Rate
2. Average Gifts	IDR 150.000 average gift for monthly donors
3. Operations and maintenance	Donors Information are up to date in the database
4. ROI	UNHCR expects to achieve Return on Investment (ROI) on this donor acquisition program as below; 12 month ROI 0.75

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