**SOW -- Mercy CorpTelemarketing Support Services**

Date: 12/7/20

1. **Mercy Corps Overview**

Mercy Corps is a global team of humanitarians, working together on the front lines of today’s biggest crises to create a future of possibility, where everyone can prosper.

Our mission: to alleviate suffering, poverty and oppression by helping people build secure, productive and just communities.

In more than 40 countries around the world, our nearly 6,000 team members work side by side with people living through poverty, disaster, violent conflict and the acute impacts of climate change. We’re committed to creating global change through local impact — 85 percent of our team members are from the countries where they work.

We bring a comprehensive approach to every challenge, addressing problems from multiple angles. Thanks to support from our extended global community, we’ve provided $4 billion in lifesaving assistance to meet the urgent needs of more than 220 million people over nearly 40 years. We also go beyond emergency aid, partnering with local governments, forward-thinking corporations, social entrepreneurs and people living in fragile communities to develop bold solutions that make lasting change possible.

1. **Project Background and Context**

**Summary**

The Resource Development team at Mercy Corps is requesting proposals for a telemarketing agency for our mass market fundraising program (Scope 1), with the option for applicants to also add to their proposal a second scope of work for in-bound call center services in support of our donor services team (Scope 2, optional add-on). We will consider all proposals for Scope 1 regardless of whether applicants choose to include the optional Scope 2, but preference will be given to those that can fulfill both scopes of work and provide a seamless donor experience, high quality calls, as well as competitive pricing.

We are seeking a partner that can work collaboratively with our fundraising, gift processing, and donor services teams, has strong project management and communications skills, is responsive to our needs, and can help us refine and improve our overall telephone experience for our donors and supporters. Call quality, a positive donor experience, and adherence to Mercy Corps’ brand and values are of the utmost importance.

In addition, of unique importance is the need to be prepared for emergency fundraising, which involves being able to quickly set up and activate a campaign during emergencies — especially large scale disasters. effectively manage an increased volume of inbound calls and donations during emergencies — especially large scale disasters that can happen anytime (earthquake, hurricane, tsunami). In these situations, there could be thousands of people calling immediately to make a donation or ask questions about our work.

**SCOPE 1 - TELEMARKETING (mass market fundraising)**

Mercy Corps is requesting proposals to select a new telemarketing partner(s) to provide a superior telephone experience to our donors, one that reinforces the donor’s support for Mercy Corps and leaves the donor feeling appreciated and valued, regardless of the donor’s decision to make a gift on the phone. A top-quality call experience is of the utmost importance and will be prioritized over other metrics.

Mercy Corps seeks a partner who can provide strategic guidance in order to effectively and efficiently meet our fundraising goals. Telemarketing serves as a key channel for building Mercy Corps’ sustainer program, and as such, sustainer calling - both sustainer invitations and upgrades - is our top programmatic priority.

### *Telemarketing program quantities (in order of priority)*

* Sustainer invitation (top priority). Initial file quantity: ~55,000 donors
* Sustainer upgrades. Initial file quantity: ~11,000 donors
* Lapsed donor reactivation. Initial file quantity: ~75,000 donors
* Current donor renewal. Initial file quantity: up to 75,000 donors
* Peer-to-peer texting (low priority) ~20,000 textable numbers

*In your proposal, please include the following*:

* Pricing per calling type
* Budget and projections based on file quantities above
* Calling approach and strategy
* Caller hiring, training and monitoring processes
  + Please include how you determine native English vs English fluency
* Sample scripts and messaging, your process for creating scripts, and options for customization
* Explain your approach to balancing call volume goals with the donors desire to chat during a fundraising call.
* Describe your quality control processes, including for calls and data
* Please provide call samples and explain your call sample policy. For instance, how long do you save call recordings? Will they be available upon request?
* What is your process for signing donors up for ACH gifts through the phone? Do you provide call samples?
* Description of your fulfillment processes and sample fulfillment letters and emails
* Please explain your methodology for processing gifts and sending donor data back to Mercy Corps
* Sample data files
* Sample campaign reports and analyses
* Description of the verticals that you work with (Do you work with nonprofits and if so, how many? Do you work with other international or humanitarian nonprofits?)
* Please explain your approach to client management and provide bios of your Account Team
* Estimated number of callers that would be assigned to Mercy Corps or how this will be determined.
* Explain how you are equipped to handle an increased volume of calls during emergencies, including how quickly you can update our scripts with new messaging.
* Please provide an overview of how quickly we could start business with you, including major milestones, deliverables and timelines
* Please explain your invoicing and billing process
* Description of additional services that you can offer
* A copy of your standard contract with terms and conditions

**OPTIONAL ADD-ON: SCOPE 2 - IN-BOUND CALL CENTER (donor services)**

Mercy Corps is requesting proposals to a new inbound call center that can answer calls and securely process donations in real-time 24/7/365, provide excellent client and donor service, and deliver accurate, clear reports.

Mercy Corps has a team dedicated to donor services and gift processing. During our office hours (M-F 8am-5pm PST), our two-person Donor Services Team answers the majority of inbound calls. Any calls that we are unable to answer during business hours or during weekends and holidays will route to the inbound call center. The call center will also answer incoming calls to our radio ads, print ads, paid search, media, and website phone lines.

*In-bound calling quantities*

* On average, Mercy Corps’ inbound call center can expect to receive 7,200 calls and $75,000-$90,000 in donations annually, with an average of 140 calls and $250 in donations per week.
* Call volume and revenue tend to be highest in November and December, with an average of about 1,200 calls in December.
* We also experience volume increases about one to four times per year when global emergencies strike.

*In your proposal, please include the following*:

* Hours of operation
* Sample scripts and messaging, your process for creating scripts, and options for customization
* Estimated costs and cost structures
* Please explain your methodology for processing gifts and sending donor data back to Mercy Corps
* Sample data files and revenue reports
* Description of the verticals that you work with (Do you work with nonprofits and if so, how many? Do you work with other international or humanitarian nonprofits?)
* Please explain your approach to client management and provide bios of your Account Team
* Estimated number of operators that would be assigned to Mercy Corps or how this will be determined
* Share your philosophy and approach to donor services
* Describe your quality control processes, including for calls and data
* Please tell us how you would use our country/program talking points and how you would ensure our programmatic information is being accurately communicated to callers/donors.
* Explain how you are equipped to handle an increased volume of calls during emergencies, including how quickly you can update our scripts with new messaging.
* Please provide an overview of how quickly we could start business with you, including major milestones, deliverables and timelines
* Please tell us if we would be required to use phone numbers owned by you or if you are able to use numbers that we own and describe how this would work
* Description of additional services that you can offer, particularly those related to processing monthly donations, recapturing lapsing monthly donors, reactivating lapsed monthly donors, thank you calls, and upselling/upgrading donors

1. **Desired Services & Scope of Work**

**GENERAL REQUIREMENTS**

* PCI Compliant
* Telephone Consumer Protection Act Compliant
* Compliance with charitable fundraising registration requirements including filing of notices and all financial reporting requirements.
* Ability to communicate quickly and efficiently with Mercy Corps and respond to requests within 24 - 48 hours
* Braintree payment processor via API calls to process one-time donations, to set up recurring monthly donations and to upgrade monthly donation amounts/update credit card information
* ACH signup recordings sent to Mercy Corps
* Data files containing donor/payment information must be encrypted (PCI compliant).
  + Preferable that an easy to use and free FTP site is utilized (e.g. FileZilla)
  + PGP Encryption Desktop is not an option
* Ability to provide phone appending services and email address collection.
* Ability for Mercy Corps to train callers directly either in-person or via phone
* Ability for Mercy Corps to conduct call monitoring (either to listen to live calls or review recorded calls)

**SCOPE 1 - TELEMARKETING**

*Strategy & Campaign Requirements*

* Ability to conduct one, some or all of the following programs: Sustainer conversion/invitation; sustainer upgrades; lapsed reactivation; current donor renewal; texting.
* Ability to call both mobile and landline phones.
* Ability to capture, record and store cell phone consent.
* Creation of campaign calendars, schedules, timelines
* Creation of campaign projections/goals
* Creation of custom scripts
* Design, print and production of fulfillment packages (mail and email)
* Ability to administer tests within a campaign
* Campaign reporting
* Ability to bring thoughtful ideas and recommendations for meeting Mercy Corps’ goals and priorities, including but not limited to the following:
  + Targeting and segmentation recommendations
  + Identification of efficiencies
  + Flexibility and willingness to try new approaches
  + Insights into industry trends

*Donor Experience & Call Quality Requirements*

* Ability to customize scripting to reflect Mercy Corps’ brand and values
* Scripting and call approach that leaves the donor leaves the call feeling appreciated, valued and good about their support of Mercy Corps
* Callers practice and internalize scripting so calls sound natural and fluid, not scripted
* Callers engage in active listening and personalization, prioritizing responding to donors’ wishes and preferences
* Callers are passionate about Mercy Corps’ mission and speak enthusiastically

*Data & Gift Processing Requirements*

* Ability to provide daily donation, sustainer signup and upgrade files (including check, ACH and credit card):
  + Data files for sustainer invitations must include: Raiser’s Edge database Donor ID, Call date, Type of sustainer sign up/pledge (e.g. check, ACH, credit card), Source (appeal for the campaign), Pledge amount, Donor’s first and last name, Donor’s address, city, state, zip, Donor’s phone number, If an ACH signup/pledge, then bank name, routing and account number must be included, Donor Comments (e.g. if a donor would like to add a fund restriction).
  + In addition to the sustainer invitation data files, sustainer upgrade files must include: Indication of whether the donor updated their credit card information or not, Old pledge amount, New pledge amount, Original pay type (check, ACH, credit card), New pay type (check, ACH, credit card).
* End of campaign files must include complete results (e.g. 1x CC Gift,1x Check Pledge, Not attempted, Refusal, etc), solicit code requests, contact change information (e.g. deceased), and other relevant donor information (e.g. name, address, Raiser’s Edge database Donor ID).
* Ability to scrub all call lists and ensure necessary data processing prior to each campaign including but not limited to removing numbers from internal and external do not call lists, removal of cell phones, modeling to improve performance, etc.

**OPTIONAL ADD-ON: SCOPE 2 - IN-BOUND CALL CENTER**

* Ability to provide daily reports on donations. Daily donation file must include: Call Date, Raiser’s Edge database Donor ID (unless a new donor), Donor’s first and last name, Donor’s address, city, state, zip, Donor’s phone number (if provided), Donor’s email address (if provided), Donation amount, Inbound 800# source (DNIS/DID Code), Appeal, Fund ID, Fund Description, Donor Comments (e.g. if a donor would like to add a fund restriction or make a solicit code request), Card Type, Braintree Transaction ID
* Ability to bill monthly with call volume broken out by inbound 800# source
* Ability to provide a monthly report that we can reconcile with the payment processor (so we’re able to see settlement dates & times by transaction and by day/month time period as well)
* Ability to route calls directly to Mercy Corps donor services during business hours (including ability to live transfer calls to Mercy Corps or cold transfer them to our voicemail)
* Ability for Mercy Corps to transfer/route calls directly to the inbound call center
* Ability to forward a single call to the call center is optional
* Ability to forward all phone lines to call center based on a control that MC manages is a requirement
* 24 hour coverage 365 days/year.
* Ability to provide phone lines to us and allow Mercy Corps to use our own lines with you
* Ability to provide call samples upon request
* Ideally located in the U.S. with native English speakers.
* Ability to have a unique script for each phone line, and ability to update scripts in a timely manner (ideally within 24 hours or less during emergencies)
* Ability to handle donor services issues (complaints, questions, comments, follow-up, etc)

*Additional In-Bound Call Center Services Desired*

* Ability to assign Mercy Corps additional 800#'s that we can use to track sources of inbound calls
* Ability to refund transactions as needed (optional but preferred)
* Bilingual
* Ability to process monthly credit card and EFT/bank transfer gifts securely and easily
* Ability of operators to speak knowledgeably about Mercy Corps’ work
* Outbound calls
* Real-time online reporting
* Sustainer payment platform
* SMS/Text Messaging capabilities, particularly to follow up with anyone who called the call center and received a busy signal
* Custom reporting
* No limit to the # of phone lines we can have

1. **Evaluation of Proposals**

Proposals will be scored using the following technical criteria. Points for each question will range from 0- 25 the maximum technical score is 100 points. Proposals should address each evaluation criteria.

* **Adherence to the RFP Requirements**: Did the bidder conform to all requirements and product or service specifications in the RFQ or RFP? (0-25)
* **Technical Criteria:** Includes the bidder’s understanding of the service or procurement required, bidders’ management plan, supplier’s qualifications and bidders’ overall resources. Does the supplier have the right qualifications? (0-25)
* **Management Criteria**: Includes the bidder’s experience on similar projects, bidder’s performance on similar projects, bidder’s available facilities and resources for the project and the bidder’s plan for management and control of the project. (0-25)
* **Cost Criteria:** Is the cost within any predetermined price range, such as cost estimates from a market analysis? In most cases cost is evaluated using value for money unless otherwise directed by donor requirements. (0-15)

1. **Proposal Format & Requirements**

In order to secure information in a form, which will ensure that your proposal will be properly evaluated, you are asked to submit your proposal in the format listed below. Standard proposal formats are acceptable provided the following information is included:

1. Name, address, telephone number and email address for principal contact.
2. A brief outline of your organization and services offered, including:
   1. Full legal name, jurisdiction of organization or incorporation and address of the company
   2. Full legal name and country of citizenry of company’s President and/or Chief Executive Officer, and all other officers and senior managers of the company
   3. Year business was established
3. Name and professional qualifications of personnel who would provide the services.
4. Names, addresses, phone numbers and email addresses of at least two clients of similar industry and scope of operations as Mercy Corps that can be contacted as references.
5. **Other Terms & Conditions**

MERCY CORPS SMALL & DISADVANTAGED BUSINESS GUIDELINE

It is the policy of Mercy Corps to encourage the greatest possible participation of disadvantaged businesses as bidders. Mercy Corps has established goals for each of the following disadvantaged business categories:

• Small Business (SB)

• Small Disadvantaged (SDB) including Alaska Native Corporations and Indian Tribes,

• Women-owned and Economically Disadvantaged Women-Owned (WOSB)

• Historically Underutilized Business Zone (HUBZone),

• Veteran Owned Small Business (VOSB)

• Service-Disabled Veteran-Owned (SDVOSB) Small Businesses and “Other than Small Business”

For purposes of this bid response, bidders should indicate their eligibility for any of the above-listed categories. If chosen as a finalist, you will be required to provide your registration number as well as additional information.

WITHDRAWAL OF RFP

Proposals may be withdrawn before the RFP submittal deadline by submitting a written request to the Contact Person. Re-submittal before the RFP submittal deadline can be made; however, they may not be re-submitted after the deadline.

RFP COSTS

All costs incurred in the preparation and presentation of proposals to the RFP shall be completely absorbed by the responding party to the RFP. All documents submitted as part of the RFP will become property of the Mercy Corps. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.

AWARD BASIS

At the option of the Mercy Corps, finalists for the Agent designation may be selected for a final round of negotiations; however, applicants are encouraged to present their best offers with their initial submission. Mercy Corps reserves the right to accept or reject any and all proposals, to waive any irregularities in any proposal process, and to make an award of contract in any manner in which Mercy Corps, acting in the sole and exclusive exercise of its discretion, deems to be in Mercy Corps best interest.