# Invitation to Tender

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| **Tender Name: Mercy Corps Telemarketing Support Services** | | **Tender No: HQ106** |
| Location: **Portland, Oregon US** | Correspondence Language(s): English | |
| Brief Summary Description of Project:  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. | | |

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| **Tender Package Available from:**  **December 7, 2020 1PM** | **Tender Package Pickup Location:**  **Website, Email** |
| **Deadline for Offer Submission:**  **January 8, 2020 5PM** | **Submit Offers to:**  **Amber Black, Mercy Corps Procurement Officer ablack@mercycorps.org** |

*Mercy Corps reserves the right to accept or reject any late offers*

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| **Questions and Answers (Q&A)** | |
| If any, Submit Questions in writing to: **Amber Black, Mercy Corps Procurement Officer, ablack@mercycorps.org** | |
| Last Day for Questions:  **Monday, December 28, 2020 5PM** | Questions will be answered by:  **Thursday, December 31, 2020 5PM** |
| Questions will be answered through: **Q/A posted on Tender posting, Mercy Corps website** | |

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| **Documentation Checklist** | |
| These documents are contained within this tender package: | * Invitation to Tender * General Conditions for Tender * Criteria and Submittals * Price Offer Sheet * Supplier Information Form * Scope of Work/Technical Specifications/BoQ * Sample Contract |

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# General Conditions for Tender

Mercy Corps invites proposals for the goods, services and/or works described and summarized in these documents, and in accordance with procedures, conditions and contract terms presented herein. Mercy Corps reserves the right to vary the quantity of work/materials specified in the Tender Package without any changes in unit price or other terms and conditions and to accept or reject any, all, or part of submitted offers.

**2.1 Mercy Corps’ Anti-Bribery and Anti-Corruption Statement**

**Mercy Corps strictly prohibits**:

* *Any form of bribe or kickback in relation to its activities*

This prohibition includes any *request* from any Mercy Corps employee, consultant or agent for anything of value from any company or individual in exchange for the employee, consultant or agents taking or not taking any action related to the award of a contract or the contract once awarded.  It also applies to any *offer* from any company or individual to provide anything of value to any Mercy Corps employee, consultant or agent in exchange for that person taking or not taking any action related to the award of the contract or the contract.

* *Conflicts of interests in the awarding or management of contracts*

If a company is owned by, whether directly or indirectly, in whole or in part, any Mercy Corps employee or any person who is related to a Mercy Corps employee, the company must ensure that it and the employee disclose the relationship as part of or prior to submitting the offer.

* *The sharing or obtaining of confidential information*

Mercy Corps prohibits its employees from sharing, and any offerors from obtaining, confidential information related to this solicitation, including information regarding Mercy Corps’ price estimates, competing offerors or competing offers, etc.  Any information provided to one offeror must be provided to all other offerors.

* *Collusion between/among offerors*

Mercy Corps requires fair and open competition for this solicitation.  No two (or more) companies submitting proposals can be owned or controlled by the same individual(s). Companies submitting offers cannot share prices or other offer information or take any other action intended to pre-determine which company will win the solicitation and what price will be paid.

Violations of these prohibitions, along with all evidence of such violations, should be reported to:

[**http://mercycorps.org/integrityhotline**](http://mercycorps.org/integrityhotline)

Mercy Corps will investigate allegations fully and will take appropriate action.  Any company, or individual that participates in any of the above prohibited conduct, will have its actions reported to the appropriate authorities, will be investigated fully, will have its offer rejected and/or contract terminated, and will not be eligible for future contracts with Mercy Corps. Employees participating in such conduct will have his/her employment terminated.

Violations will also be reported to Mercy Corps’ donors, who may also choose to investigate and debar or suspend companies and their owners from receiving any contract that is funded in part by the donor, whether the contract is with Mercy Corps or any other entity.

**2.2 Tender Basis:**

* All offers shall be made in accordance with these instructions, and all documents requested should be furnished, including any required (but not limited to) supplier-specific information, technical specifications, drawings, bill of quantities, and/or delivery schedule. If any requested document is not furnished, a reason should be given for its omission in an exception sheet.
* No respondent should add, omit or change any item, term or condition herein.
* If suppliers have any additional requests and conditions, these shall be stipulated in an exception sheet.
* Each offeror may make one response only.
* Each offer shall be valid for the period of 180 days from its date of submission.
* All offers should indicate whether they include taxes, compulsory payments, levies and/or duties, including VAT, if applicable.
* Suppliers should ensure that financial offers are devoid of calculation errors. If errors are identified during the evaluation process, the unit price will prevail. If there is ambiguity on the unit price, the Selection Committee may decide to disqualify the offer.
* Any requests for clarifications regarding the project that are not addressed in written documents must be presented to Mercy Corps in writing. The answer to any question raised in writing by any offeror will be issued to that offeror. In some cases Mercy Corps may choose to issue clarifications to all offerors. It is a condition of this tender that no clarification shall be deemed to supersede, contradict, add to or detract from the conditions hereof, unless made in writing as an Addendum to Tender and signed by Mercy Corps or its designated representative.
* This Tender does not obligate Mercy Corps to execute a contract nor does it commit Mercy Corps to pay any costs incurred in the preparation and submission of proposals. Furthermore, Mercy Corps reserves the right to reject any and all proposals, if such action is considered to be in the best interest of Mercy Corps.

**2.3 Supplier Eligibility**

Suppliers may not apply, and will be rejected as ineligible, if they :

* Are not registered companies
* Are bankrupt or in the process of going bankrupt
* Have been convicted of illegal/corrupt activities, and/or unprofessional conduct
* Have been guilty of grave professional misconduct
* Have not fulfilled obligations related to payment of social security and taxes
* Are guilty of serious misinterpretation in supplying information
* Are in violation of the policies outlined in Mercy Corps Anti Bribery or Anti Corruption Statement
* Supplier (or supplier’s principals) are on any list of sanctioned parties issued by; or are presently excluded or disqualified from participation in this transaction by: the United States Government or United Nations by the United States Government, the United Kingdom, the European Union, the United Nations, other national governments, or public international organizations.

Additional eligibility criteria, if applicable, are stated in section 3.2 of this tender package.

**2.4 Response Documents**

Offerors can either utilize the response documents contained in this tender package to submit their offer or they can submit an offer in their own format as long as it contains all the required documents and information specified by this tender.

**2.5 Acceptance of Successful Response**

Documentation submitted by offerors will be verified by Mercy Corps. The winning offeror will be required to sign a contract for the stated, agreed upon amount.

**2.6 Certification Regarding Terrorism**

It is Mercy Corps’ policy to comply with humanitarian principles and the laws and regulations of the United States, the European Union, the United Nations, the United Kingdom, host nations, and other applicable donors concerning transactions with or support to individuals or entities that have engaged in fraud, waste, abuse, human trafficking, corruption, or terrorist activity. These laws and regulations prohibit Mercy Corps from transacting with or providing support to any individuals or entities that are the subject of government sanctions, donor rules, or laws prohibiting transactions or support to such parties.

# Criteria & Submittals

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| **3.1 Contract Terms**  Mercy Corps intends to issue a **Fixed Price plus Fixed Fee/Time and Materials** contract to one or several company(ies) or organization(s). The successful offeror(s) shall be required to adhere to the statement of work and terms and conditions of the resulting contract. The anticipated contract is incorporated in Section 6 herein. By submitting an offer, offerors certify that they understand and agree to all of the terms and clauses contained in Section 6. |
| **3.2 Specific Eligibility Criteria**  Eligibility criteria must be met and the corresponding supporting documents listed below under “Tender Submittals” **must** be submitted with offers. Offerors who do not submit these documents may be **disqualified** from any further technical or financial evaluation.  Eligibility Criteria:   * The offeror must be legally registered * The offeror must be in good standing with its governing tax authority |
| **3.3 Tender Submittals**  Documents and required information listed in tender submittals are necessary in order to support the eligibility criteria and to conduct technical evaluations of received offers (and due diligence). While absence of these documents and/or information does not denote mandatory disqualification of suppliers, the lack of these items has the potential to severely and negatively impact the technical evaluation of an offer.  **Documents supporting the Eligibility Criteria:**   * Legal Business Registration * Latest Tax Registration Certificate   **Documents to conduct the Technical Evaluation and additional Due Diligence:**   * Company Profile, 2 page max * References from previous work projects (including contact information)   **Price Offer :**  The Price offer is used to determine which offer represents the best value and serves as a basis of negotiation before award of a contract. A Fixed-Price contract, the price of the contract to be awarded will be an all-inclusive fixed price basis, either in the form of a total fixed price or a per-unit/deliverable fixed price. No profit, fees, taxes, or additional costs can be added after contract signing. Offerors must show unit prices, quantities, and total price, as displayed in the Offer Sheet in Section 4. All items must be clearly labeled and included in the total offered price. |
| **3.4 Currency**  Offers should be submitted in: USD  Payments will be made in: USD |

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| **3.5 Tender Evaluation (Trade-Off Selection Method)**  Based on the above submittals, a Mercy Corps Tender Committee will conduct a tender evaluation process. Mercy Corps reserves the right to accept or reject any or all proposals, and to accept the offer(s) deemed to be in the best interest of Mercy Corps. MC will not be responsible for or pay for any expenses or losses which may be incurred by any Offeror in the preparation of their tender.  Evaluations will be conducted as described in the following subsections: |
| **3.5.1 Scoring Evaluation**  ***Trade-Off Method***  Mercy Corps Tender Committee will conduct a technical evaluation which will grade technical criteria on a weighted basis (each criteria is given a percentage, all together equaling 100%). Offeror's proposals should consist of all required technical submittals so a Mercy Corps committee can thoroughly evaluate the technical criteria listed herein and assign points based on the strength of a technical submission.  Award criteria shall be based on the proposal’s overall **“value for money”** (quality, cost, delivery time, etc.) while taking into consideration donor and internal requirements and regulations. Each individual criteria has been assigned a weighting prior to the release of this tender based on its importance to Mercy Corps in this process.  Offeror(s) with the best score will be accepted as the winning offeror(s), assuming the price is deemed fair and reasonable and subject to the additional due diligence in section 3.5.2.  When performing the Scoring Evaluation, the Mercy Corps tender committee will assign points for each criteria based on the following scale:   |  |  | | --- | --- | | **Point** | **Rationale** | | 0 | Not acceptable; has not met any part of the specified criteria | | 1-4 | Has met only some minimum requirements and may not be acceptable | | 5 | Acceptable | | 6-9 | Acceptable; has met all requirements and exceeds some | | 10 | Acceptable; has exceeded all requirements |  |  |  |  | | --- | --- | --- | | **Evaluation Criteria** | **Weight**  **(%)** | **Possible Points**  **(1 to 10)** | | **(A)** | **(B)** | | Product/Service/Work Technical Specifications Includes the bidder’s understanding of the service or procurement required, bidders’ management plan, supplier’s qualifications and bidders’ overall resources. | 25% | 10 | | Price/Cost | 25% | 10 | | 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 | 25% | 10 | | Corporate Capabilities Does the bidder conform to all requirements and product or service specifications in the RFQ or RFP | 25% | 10 | | **TOTAL POSSIBLE SCORE:** | **100%** | **40** | |
| **3.5.2 Additional Due Diligence**  Upon completion of both the technical and financial evaluations Mercy Corps may choose to engage in additional due diligence processes with a particular supplier or supplier(s). The purpose of these processes is to ensure that Mercy Corps engages with reputable, ethical, responsible Suppliers with solid financials and the ability to fulfill the contract. Additional due diligence may take the form of the following processes (though it is not limited to):   * Reference Checks * Determination of relations and affiliations between offerors * Other appropriate documented method giving Mercy Corps increased confidence in the supplier’s ability to perform |

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# Offer Form

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| **Offerors must submit their own independent offer including at least (but not limited to):**   * All documents requested in the “Eligibility Criteria” section of this Tender Package * All documents requested in the “Tender Submittals” section of this Tender Package * All information listed in the “Documents Comprising the Proposal” section below   **All offers must be duly signed (including position and full name of the signer) and stamped, with the date of completion.** |

***Documents Comprising the Proposal***

The following information must be included in the offer of any potential offeror:

* **Cover Letter** explaining interest to be a contracted vendor or supplier, and the details of the Proposal. The content of the cover letter shall include the following information:
* A detailed specification of the offered goods, services and/or works (Proposal)
* Warranty (if necessary and appropriate)
* Delivery time
* Price validity date (for this purpose and as stated on the advertisement, quote given shall remain unchanged for 180 working days)
* A Price Offer detailing the unit price only, using the **Price Offer Sheet** template provided in section 7
* Completed and signed Mercy Corps **Supplier Information Form** (template provided in section 7)
* Other important documents offeror feels need to be attached to support their proposal

The original proposal shall be signed by the offeror or a person or persons duly authorized to bind the offeror to the contract. Financial offer pages of the proposal shall be initialed by the person or persons signing the proposal and stamped with the company seal.

Any interlineations, erasures, or overwriting shall be valid only if they are initialed by the person or persons signing the proposal.

# 5. Scope of Work/Technical Specifications

**5.1 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.

**5.2 Scope of Work for Service**

**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)
* **Mercy Corps Small and Disadvantaged Businesses Guideline:** Does the bidder fall into this group? (0-10) Award will be made on the basis of “best value”, as determined by the evaluation process. The ability to perform the services will be deemed most important when evaluating bids.

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
   4. Name and professional qualifications of personnel who would provide the services.
   5. 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.

# 6. Attachments to the Tender Package

* **Attachment 1 -Supplier Information Form template**
* **Attachment 3-Statement of Work**

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