

TERMS OF REFERENCE (TOR)
CONSULTANCY
Fundraising Telemarketing Consultant

Expected start date of consultancy:	01.11.2020
End date of consultancy:	31.01.2021
Reporting to:	Fundraising Officer – Individual Giving

I. Background

UNICEF promotes the rights and wellbeing of every child, in everything we do. Together with our partners, we work in 190 countries and territories to translate that commitment into practical action, focusing special effort on reaching the most vulnerable and excluded children, to the benefit of all children, everywhere. The world’s largest provider of vaccines for developing countries, UNICEF supports child health and nutrition, good water and sanitation, quality basic education for all boys and girls, and the protection of children from violence, exploitation, and AIDS. UNICEF is funded entirely by the voluntary contributions of individuals, businesses, foundations and governments.

This Private Sector Fundraising and Partnerships (PSFP) 2018-2023 Plan sets out the results and strategies that UNICEF will pursue to maximize resources and leverage the influence of the private sector. UNICEF Bulgaria’s fundraising strategy is focused on two main income streams from the private sector –monthly individual giving and corporate partnerships with higher income potential.

II. Overall objective of the assignment

UNICEF is seeking two Consultants to provide telemarketing services for donor stewardship. The objective of the assignment is to contribute to the successful implementation of the individual giving and nurturing strategy, and to strengthen individual donors’ engagement and retention through telemarketing activities.

The CO is planning to conduct long-term telemarketing activities with

The Consultants will work under the general supervision of the Fundraising Officer - Individual Giving and in close cooperation with the Fundraising Associate – Individual Giving.

III. Specific tasks of the assignment

1. Contribute to the successful implementation of the planned integrated fundraising campaigns and events for acquisition of new monthly donors through telemarketing activities.
2. Support the successful implementation of the supporters’ engagement plan to increase donor loyalty, retention and maximise donor value.
 - Contact one-off private individual donors by telephone in order to solicit monthly donations (conversion calls).

- Conduct welcome and thank you calls to new individual monthly donors to check the accuracy of the data, get feedback regarding to the conversation the donor had with the fundraiser in the street and improve retention.
 - Contact active monthly supporters to upgrade their monthly gift.
 - Conduct reactivation calls to lapsed pledge donors to renew stopped/closed donations.
 - Perform other type of calls upon request as part of fundraising campaigns and events.
3. Provide feedback to telemarketing scripts and recommendations to better target the needs and interests of specific individuals.
 4. Verify and collect donor data if needed such as name, e-mail and other information and accurately enter it into donor data base, in the format provided by UNICEF.
 5. Ensure that procedures and quality assurance are in place both in terms of quality of interaction and in terms of data collection and maintenance.
 6. Ensure data confidentiality and security.
 7. Provide regular reports on the results of the activities, including feedback from donors and personal data collected;

IV. Deliverables from the assignment

1. The full contact list provided (approximately 3,000 contacts) is reviewed as per UNICEF instructions and at least five call attempts are conducted for the duration of the contract.
2. All out-band calls are conducted as per the provided script and requirements.
3. Upgrade calls are conducted to pledge donors, in order to thank them and to ask them to increase the amount of their monthly donation.
4. Reactivation calls are made to lapsed pledge donors, in order to reactivate closed donations.
5. Donor data such as name, e-mail, etc. is accurately recorded in UNICEF database.
6. Daily reports, including the number of contacted donors, number of donors who agreed to continue the conversation, number of donors who provided their personal data to UNICEF and the respective data, accurately maintained, number of donors who did not answer the phone after 5 attempts and the number of donors who refused to disclose their personal data (and, if possible, the reason for that).

KPIs:

- A minimum of 1,000 success calls are conducted per month (approx. 50 calls per day);
- Contact rate - At least 80% of the donors are reached on the phone;
- Conversion rate (one-off to pledge): 5%
- Upgrade rate: 20%

- Reactivation rate of stopped pledge donors: 30%
- Data is entered accurately in the donor data base as per UNICEF requirements.

V. Confidentiality and security

The contractor will treat donors' details received from UNICEF with highest confidentiality. The contractor is responsible for the security of data, ensuring that no data is transferred to a third party, by any means.

VI. Timeframe and duration of the assignment

The assignment will be conducted for initial period of three months (November 2020 – January 2021) with possibility for extension upon satisfactory work performance and planned fundraising activities.

The Consultants will work remotely and will have flexible working arrangement a minimum of 10 working days per month.

VII. Required education, experience and competencies

- Secondary education.
- Excellent communication skills;
- Initiative, passion and commitment to UNICEF's mission and values;
- Strong organizational skills;
- Attention to detail and problem-solving skills;
- Drive for results;
- Proficiency in MS Office (MS Excel in particular);
- Previous professional work experience as telemarketing agent and customer service would be an asset;
- Fluency in Bulgarian language is a fundamental requirement;

VII. Remuneration and conditions

- The Consultant will work remotely/ from home;
- The Consultant will work on tablet/laptop and mobile phone provided and paid by UNICEF;
- The Consultant will work on flexible hours from 9:00 to 19:00, Monday to Saturday, a minimum of 10 working days per month based on agreed monthly schedule;
- The Consultant will be paid based on performance and a fixed fee per successful call.
- The consultant will receive a fixed amount for the data review and processing of 3,000 contacts.

A call is considered successful and is included in the monthly report for payment if a conversation took place. Failed attempts or no answer calls are not considered successful and will not be included in the monthly payment report.

VIII. Monitoring and evaluation of the assignment

The selected Contractor will work under the general supervision of the Fundraising Officer – Individual Giving and in close cooperation of the Fundraising Associate – Individual Giving.

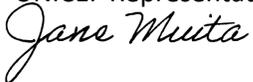
KPI reports will be monitored and reviewed on a weekly and monthly basis.

Prepared by:

Petya Petkova - Grozdanova
Fundraising Officer – Individual Giving

Approved by:

Jane Muita
UNICEF Representative in Bulgaria



15.09.2020