

# **LONG-TERM AGREEMENT FOR INDIVIDUAL CONSULTANTS**

## **TERMS OF REFERENCE**

**Title:** Long Term Agreement (LTA) for Engagement of Individual Consultants as Telemarketing Fundraising Agent

**Duty Station:** Home based consultancy contract

**Duration of LTA:** Two years with the possibility of extension for one more year (max. 3 years)

### **1. BACKGROUND / RATIONALE**

Since 1946 UNICEF has been the world's leading agency for child rights, represented in more than 190 countries and territories to help children survive and thrive, from early childhood through adolescence. UNICEF supports child health and nutrition, quality basic education for all boys and girls, and the protection of children from violence, exploitation, and abuse.

UNICEF is funded entirely by the voluntary contributions of individuals, businesses, foundations, and governments thus UNICEF needs regular funding to operate and deliver results for children. In 2024, as a key component of UNICEF Bulgaria PSFR (Private Sector Fundraising) Strategy 2023-2027, there is a strategic focus on enhancing communication and engagement with individual donors while optimizing revenue from regular monthly pledge donations. In view of this need, UNICEF Bulgaria intends to strengthen the Stewardship program with a focus on increasing donors' retention, loyalty and lifetime value.

### **2. PURPOSE OF ASSIGNMENT**

To meet these requirements, UNICEF would like to engage the services of Telemarketing Fundraiser to provide telemarketing services for donor stewardship. The assignment's objective 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 and follow-up email communication.

### **3. OBJECTIVE(S)**

The overall objective is to set up a Long-Term Agreement to facilitate and expedite the process by which UNICEF in Bulgaria will hire Telemarketing Fundraiser as required for implementation of the supporters' engagement plan.

### **4. MAJOR TASKS TO BE ACCOMPLISHED**

Tasks include, but may not be limited to:

- i. Contact one-off private individual donors by telephone and follow-up email to solicit monthly donations (conversion calls).
- ii. Contact active monthly supporters to upgrade their monthly gift.
- iii. Conduct reactivation calls and follow-up email to lapsed pledge donors to renew stopped/closed donations.
- iv. Perform other types of calls and follow-up email upon request as part of fundraising campaigns and events.
- v. Provide feedback to telemarketing scripts and recommendations to better target the needs and interests of specific individuals.

- vi. Verify and collect donor data if needed such as name, ID, address, e-mail and other personal information and accurately enter it into donor database, in the format provided by UNICEF.
- vii. Ensure that procedures and quality assurance are in place both in terms of quality of interaction and in terms of data collection and maintenance.
- viii. Ensure data confidentiality and security.
- ix. Provide regular reports on the results of the activities, including feedback from donors and personal data collected.

**Responsibilities of the Consultant:**

- i. The Consultant will work remotely/ from home;
- ii. The Consultant will work on a tablet/laptop and mobile phone provided and paid by UNICEF.
- iii. The consultant will not give the content/material or any part thereof, to any third party without the written permission of UNICEF.

**Responsibilities of UNICEF:**

- i. UNICEF will provide all details pertaining to the activity and the requirements
- ii. UNICEF will orient the consultant on UNICEF's branding guidelines

**5. DELIVERABLES AND DEADLINES**

No.	Tasks for different areas	Deliverable	Specific delivery date/deadline for completion of deliverable	Estimated travel required for completion of deliverable
1.	Telemarketing campaigns and activities for	<ul style="list-style-type: none"> <li>- Welcome calls</li> <li>- Conversion calls</li> <li>- Upgrade calls</li> <li>- Saving calls</li> <li>- Reactivation calls</li> </ul>	As and when requested by UNICEF in alignment with Supporters' engagement plan 2024 and donors' loyalty program. Performance is monitored against set targets, reports and analysis are prepared following each activity monthly.	No
2.	Fundraising and marketing communication	<ul style="list-style-type: none"> <li>- Follow-up email communication after each type of Telemarketing campaigns.</li> <li>- In-bound email communication from <a href="mailto:donorsupport@unicef.org">donorsupport@unicef.org</a></li> </ul>		
3.	Data collection and Reporting	<ul style="list-style-type: none"> <li>- Data is entered accurately in the donor data base as per UNICEF requirements.</li> <li>- Telemarketing campaign reports</li> </ul>		

**6. CHILD SAFEGUARDING**

*Is this project/assignment considered as "[Elevated Risk Role](#)" from a child safeguarding perspective?*

YES NO If YES, check all that apply:

**Direct contact role** YES NO

*If yes, please indicate below the number of hours/months of direct interpersonal contact with children, or work in their immediately physical proximity, with limited supervision by a more senior member of personnel:*

**Child data role**        YES **NO**

*If yes, please indicate below the number of hours/months of manipulating or transmitting personal identifiable information of children (name, national ID, location data, photos):*

**7. DUTY STATION:**

Anywhere in Bulgaria as assignment will be completed from home.

**8. OFFICIAL TRAVEL INVOLVED: (ITINERARY AND DURATION)**

No travel envisaged for this consultancy; however, the consultant might be required to travel for specific events (e.g. if in-person training or documentation missions or meetings are required by UNICEF) in which case payment of travel costs including tickets, lodging, etc. should be agreed upon, between the supervisor and the consultant prior to travel and will be reimbursed on actuals.

**9. ESTIMATED DURATION OF LTA**

The Long-Term Agreement will be for a duration of three years. The initial period would be for two years with an option for renewal for a subsequent year on the same rates, terms and conditions, subject to satisfactory performance evaluation and continuing need for the service.

**10. QUALIFICATIONS / SPECIALIZED KNOWLEDGE / EXPERIENCE/ COMPETENCIES  
(CORE/TECHNICAL/FUNCTIONAL) / LANGUAGE SKILLS REQUIRED FOR THE ASSIGNMENT**

- 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.

**Note: UNICEF will award LTA to top ranked 1-3 candidates.**

**11. TECHNICAL EVALUATION CRITERIA (WITH WEIGHTS FOR EACH CRITERIA)**

The selection of consultants for the LTA will be based on technical evaluation and financial offers in the ratio of 80:20. The criteria for technical evaluation will be as follows:

Criteria	Marks	
	Min	Max
1. Cover Letter – Explaining the motivation for applying and explaining how the qualifications and skill set of the candidate are suitable for this position.	6	10
2. Relevant educational qualifications of the candidate.	11	15
3. Relevant work experience	11	15
4. An interview with shortlisted candidates	28	40

<b>TOTAL TECHNICAL SCORE</b> The minimum overall qualifying score is 56. Only those candidates who meet the overall qualifying marks of 56 and score the minimum cut-off in each of the above sub-criteria, including the interview, will be considered technically responsive, and their financials will be opened.	56	80
<b>Financial Score</b> The selection of the consultant will be on the basis of technical evaluation & financial offer in the ratio of 80:20		20
<b>TOTAL</b>		100

## 12. PAYMENT SCHEDULE

The LTA to be signed will have a fixed fee rate for three years. Payments for monthly assignments will be executed after delivery of the services is approved by UNICEF on a monthly basis.



**Approval of Representative:** .....

Christina de Bruin , 02.02.2024