

UNICEF YEMEN

TERMS OF REFERENCE FOR SERVICES - INSTITUTIONS

SHORT TITLE OF ASSIGNMENT

Professional Training on Call Centre skills for UNICEF Yemen

BACKGROUND

The war that erupted in Yemen in 2015 has displaced millions of people, put millions a step away from famine, and robbed the future of millions of children. The humanitarian situation in Yemen continues to deteriorate, affecting the entire population of Yemen while placing the heaviest toll on children and women. The deterioration is not only caused by the depreciation of the Yemeni Riyal, inflation, decline in food security and livelihoods, but also by the ongoing fighting and violence in different areas across the country. Lack of salaries for civil servants, impediments to commercial and humanitarian supplies to enter the country, further compounded by an already dire humanitarian situation is eroding the resilience of many vulnerable families and children. A growing number of families are unable to afford the rising cost of basic services and commodities - including food – and are forced to making agonizing decisions to survive and thrive.

As the conflict escalates and the humanitarian needs of the Yemeni children and families keep growing, UNICEF Yemen has been strengthening its response with the ultimate goal of supporting the most vulnerable and contributing to ensure that children's rights are protected, everywhere.

The grievance redressal mechanism is a critical component of any cash and voucher project, as a platform for beneficiaries to exercise their rights. It allows beneficiaries to voice their dissatisfaction with any aspect of the project or request support in collecting their benefits. To this end, UNICEF operates a Call Centre through a toll-free line. The Call Centre is established at UNICEF premises in Sana'a, Yemen, and all its personnel is under the direct oversight of the UNICEF Project Management Unit (PMU).

Hand in hand with the grievance collection component comes the redressal. Having a structure that timely responds and addresses the concerns of the beneficiaries is key to build confidence and serves as a valuable source of information for the PMU on areas requiring adjustment in the projects' design and protocols. To this end, the PMU and established a case management team working under the direct oversight of the PMU. Case Managers based in Amman and working under a Case Management Supervisor, review and analyse each case, decide on the protocol fit for the case and ensure this is properly implemented. To this end, case managers are required to get in touch with the beneficiaries to understand their complaints and obtain the information required for a decision to be taken.

To meet this need, it is essential to provide professional training to the case management team to improve their call handling and active listening skills.

OBJECTIVE

UNICEF is seeking to enter into a non-exclusive Time Bound Long-Term Agreement with an experienced consumer/customer engagement consultants/agency with existing capacity and experience in delivering training to call centre personnel to improve their call handling skills.

SCOPE OF WORK, ACTIVITIES, TASKS, DELIVERABLES AND TIMELINES, PLUS BUDGET PER DELIVERABLE

The training will target case managers recruited by UNICEF. Specifically, the training will focus on enhancing their capacity in:

- a) **Communication skills** which include voice tone, confirmation of understanding the issue, how to handle procedures as per UNICEF's policies - to be customized based on the customers of the UNICEF projects.
- b) **General Telephone Manners** which include hold and pause procedures, and agents Key Performance Indicators and quality metrics to enable the agent to understand how s/he should handle the call and on which KPIs the calls will be evaluated;
- c) **Information accuracy** including use of the tools available to know the procedures and information that can be used;

- d) **Handling difficult calls**, how and when to escalate the calls to next management level.
- e) **Handling calls during busy times** to focus more on procedural things and how to serve the customer within short average handling time (AHT).
- f) **What to focus on during the call** (based on UNICEF's Quality KPIs):
 - a. CSAT (Customer Satisfaction) - how to increase the customer satisfaction;
 - b. Call AHT (Average Handling Time) – where agents should focus on the time they spend during the call;
 - c. Information Accuracy.
- g) Closing the call and how to gain the agreement that customer is either satisfied and knows that the issue has been resolved or from where it will be solved.

Responsibilities

- The contracted service provider will be responsible for assessing the knowledge gaps of the trainees, develop a tailored training methodology and training materials which upon UNICEF approval, the contractor will deliver to the trainees;
- UNICEF will be responsible for identifying the trainees, providing a training location, coffee and lunch breaks.

Tasks of the contractor	Deliverables	Timeframe	Payment terms
1. Assess the knowledge gaps/training needs of the call centre agents/case managers and supervisors; 2. Develop a tailored training methodology to meet these needs; 3. Develop the training outline; 4. Develop the training materials; 5. Identify qualified trainers; 6. Compile all the above to write and submit the inception report;	Inception report including methodology, training outline and materials, and trainers' CV.	1.5 weeks after contract signature	30% of total amount
1. Develop pre and post training test; 2. Collect trainees' attendance to training; 3. Deliver the training; 4. Apply the pre and the post-test;	Package containing training presentations and materials; attendance sheet with names and signatures of trainees and trainers; results of pre and post training test.	3 weeks after contract signature	40% of total amount
1. Analyse the results of the pre and post-test; 2. Identify knowledge gaps and recommendations; 3. Summarise the training outcomes; 4. Compile all the above to write and submit the final report.	Training report on the conducted training including analysis of test results and recommendations for further improvements	4 weeks after contract signature	30% of total amount

Reporting/deliverables

A. Inception Report:

- **Content:** The report shall be concise and to the point, providing an overview of the needs assessment that was conducted, its results, training approach and methodology, training outline, trainers and training dates. Annexes shall include training materials, CV of Trainers, Training Agenda.
- **Length:** 5 – 8 pages in Arial, 10pt, excluding annexes.
- **Language:** English for all contents. English and Arabic for the training materials only.
- **Format:** Word and PDF document, Soft copy.

B. Training Presentations and Materials:

- **Language:** English and Arabic.
- **Format:** PDF document, Soft copy.

C. Final Report:

- **Content:** The report shall be concise and to the point, providing an overview of the training conducted and its outcome, including final training outline, trainers and training dates; as well as an analysis of the training results and recommendations
- **Length:** 5 – 10 pages in Arial, 10pt, excluding annexes.
- **Language:** English for all contents.
- **Format:** Word and PDF document, Soft copy.

QUALIFICATIONS, SPECIALIZED EXPERIENCE AND ADDITIONAL COMPETENCIES

- Commercial and Legal Registration to provide training services in Jordan and/or Yemen.
- Proven track record of delivering training on customer engagement service/Call Centre for clients with specialized services in Jordan and/or Yemen;
- Capacity to deploy qualified trainers with proficiency in Arabic and English, and in delivering training for different levels of expertise (basic, advanced) in Jordan and/or Yemen;
- Experience of working with the UN and other international organization will be an asset.

CONDITIONS OF WORK

The training venue and costs of coffee breaks and lunch would be provided by UNICEF in Amman, Jordan and/or Sana'a, Yemen. Yet, the financial proposal shall include costing for training venue and costs as an optional cost.

CRITERIA FOR EVALUATION - INSTITUTIONS

The evaluation procedure will focus on both technical and financial suitability. The weights of 70% and 30% shall be applied for technical and financial compliance respectively. Only firms scoring at least 70% of the maximum score during technical evaluation will be considered for financial evaluation.

Summary of Evaluation Score distribution		Points Obtainable
1.	Bidder's qualification, capacity and experience	30
2.	Proposed methodology and approach	15
3.	Management structure and key personnel deployed for the project	25
4.	Financial proposal	30
Total		100
Section 1. Bidder's qualification, capacity and experience		Points obtainable
1.1	<u>Management structure</u> : general Organizational Capability which is likely to affect implementation: management structure, financial stability and project financing capacity, project management controls, reputation of the organization and staff credibility.	10
1.2	<u>Legal status</u> : vendor is a legally registered entity in Jordan/Yemen.	5
1.3	<u>Experience</u> : relevance of specialized knowledge and experience in detail (scale, scope and work delivered by applicants) on similar engagements.	10
1.4	<u>Reference documents</u> : for projects of similar nature and volume that verify that the bidder has a satisfactory completion and record demonstrate bidder's capability of meeting the project requirements.	5
Total Section 1		30
Section 2. Proposed Methodology, Approach and Implementation Plan		Points obtainable
2.1	Understanding of the requirement: Have the important aspects of the task been addressed in sufficient detail? Are the different components of the project adequately weighted relative to one another?	5
2.2	A detailed description of the proposed methodology for the training, including a description of activities, envisaged working modalities, which stakeholders are sought to be involved and how stakeholder involvement will be secured.	10
Total Section 2		15
Section 3. Management Structure and Key Personnel		Points obtainable
1.1	Account manager and personnel deployed for the project hold a minimum of Bachelor's degree. <i>Submit CVs of all project staff. Following the general terms of condition for LTA, once the LTA will be awarded the project staff whose CV are submitted for technical evaluation will stay in the project for minimum of a year. In case core staff will leave the project it needs to be informed to UNICEF 14 working days in advance.</i>	10
2.1	Account manager and personnel deployed for the project have in-depth knowledge and professional experience in customer engagement, Call Center handling. Previous experience in handling non-profit related issues will be considered a plus.	15
Total Section 3		25

Section 4. Financial Proposal		Points obtainable
4.1	Detailed cost breakdown is required to be submitted as per below standard template	30

Financial Proposal Evaluation Form (Applicants must provide a detailed breakdown and budget narrative to explain the budget)

Note

- The rates should be maximum ceiling prices including all duties and taxes (except sales tax).
- Payment will be made on actuals upon submission of statement of expenditure and invoices.

Required Pricing

S. No	Item	Unit	USD (Please provide / amount or range in USD)
1	Staff training charges	Per Person/ Per day	
2	Trainer(s) costs	Each Person /Per month	

Optional Pricing

S. No	Item	Unit	USD (Please provide / amount or range in USD)
3	Training space and rentals in Amman	Per Month	
4	Training space and rentals in Sana'a	Per Month	

Bidders are requested to submit the following:

- Bidder UNGM registration number as per instructions;
- Bids to be submitted through intend (e-tendering system) for which self-explanatory process will be given on UNGM/tender advertisement;
- Written confirmation from the bidder that the company/ any of the Directors has no ongoing litigations or fraud related cases;
- Detailed portfolio of the company;
- Details of account planning and management structure along CVs of the professional account manager and personnel;
- Registration certificates and audit reports;

Bidders are requested to observe following:

- Bidders passing 70% score of technical evaluation will be considered for further selection processes.
- UNICEF reserves the right to carry out a site visit of vendor office premises prior to LTA issuance.
- If deemed necessary, UNICEF may seek clarifications on any aspect from the bidder. However, that would not entitle the bidder to change or cause any change in the substances of the bid already submitted or the price quoted.
- The bidder may be asked to give presentation for clarification of the bid.
- The vendor will treat as confidential all data and information about UNICEF, obtained in the process of executing its responsibilities, in strict confidence and will not reveal such information to any other party without prior written approval of UNICEF.
- Financial quotation should be exclusive of General Sales Tax, where Exemption certificate duly endorsed by MoFA. Tax exemption will be arranged by UNICEF Yemen upon proforma submission by the service provider.
- All the payment will be made on actual.
- In order to ensure good quality services to be provided by the bidders, UNICEF reserves the right to disqualify any bidder(s) who are proven to have many ongoing assuagements with other clients/UNICEF that is likely to be a cause of overstretching that could lead to poor services.