

Request for Proposal (RFP)

Title: Telemarketing Donor Relations

Helvetas invites interested parties to provide offers for the services as described below.

1. Background and schedule

Helvetas Swiss Intercooperation invites interested agencies to submit bids for telemarketing services to maintain and develop donor relationships. The aim is to strengthen donor loyalty, win back inactive donors, and tap into additional potential.

The services are outlined in detail in Annex 1 – Terms of Reference (ToR) of this document.

2. Timetable

	DATE	TIME - CET
Tender announcement published on the Helvetas website and advertised via various digital channels.	20 Feb 2026	N/A
Deadline for written enquiries to procurement.HO@helvetas.org	04 March 2026	17:00 CET
Last date for Helvetas to issue clarifications (clarifications can be found in the same link where this RFP was posted on Helvetas' website)	12 March 2026	17:00 CET
Deadline for submitting offers to the procurement.HO@helvetas.org account ¹	20 March 2026	17:00 CET
Selection of the agency and awarding of the contract for 2027	20 April 2026	

3. Nature of the contract

A framework agreement with a term of four years will be drawn up with a maximum of three top-scoring bidders after the evaluation process is finalized.

4. Negotiations

Helvetas reserves the right to enter into negotiations with all, or individual, or part of eligible bidders in order to amend and/or complete their original offers. Negotiations may concern the technical, financial, legal and other aspects of the contract.

¹ Any application received after this deadline will not be considered.

5. Conditions of participation and grounds for exclusion

Participation is open to all legal entities registered in Switzerland or the EU.

The following are not eligible to participate:

- Entities or groupings of such entities (consortia) are not allowed to apply².
- Public officials
- Consultants may only be named in one bid submitted by an agency. Multiple mentions in several bids will result in exclusion from the process.

6. Costs for preparing the bid

All costs incurred by the bidder in connection with the preparation and submission of the bid will not be reimbursed. This also applies to costs incurred in the course of negotiations or discussions. The bidder is fully responsible for all costs.

7. Provisional commencement date of the contract

01 January 2027.

8. Planned implementation period and possible contract extension

Cooperation with the selected agency will begin on 01 January 2027. The contract has a term of four years and can be terminated by either party within six months.

9. Evaluation of bids

Each bid will be evaluated in accordance with the criteria and the weighting as explained in this document. The criteria for evaluation of services will be examined in accordance with the requirements indicated in this document and its attachments.

The entire evaluation procedure is confidential. The Technical Evaluation Committee (TEC) decisions are collective, and its deliberations are held in a face-to-face or virtual session. The members of the TEC are bound to secrecy. The evaluation reports and written records are for official use only and may be communicated neither to the bidders nor to any party other than Helvetas.

9.1 Evaluation of bids

Eligibility, Technical and Financial offers will be evaluated as per the criteria set below.

9.1.1 Eligibility criteria

² A consortium may be a permanent, legally established grouping or a grouping that has been constituted informally for a specific tender procedure.

Only the bidders that provide a signed forms below will be processed for further evaluation:

- **Eligibility Documentation Form (See ELIGIBILITY DOCUMENTATION under PART 1 below)**

9.1.2 Evaluation of technical criteria of eligible offers

The evaluation is carried out by an internal Evaluation Committee (TEC) based on the following criteria. This step does not require any creative work in advance, and no cancellation fee will be paid.

Requirements	Description	Documentary evidence	Weighting points
1. Telemarketing Expertise	The agency must have at least 5 years of experience in telemarketing for NGOs in the field of development cooperation, including verifiable results (KPIs, success stories).	Project examples with quantified outcomes References from comparable NGOs Customer list	20
2. Technical Requirements	The agency ensures a technically stable and GDPR-compliant integration with the Helvetas Microsoft Dynamics environment as per Annex 2.	Description of existing system integrations for clients Confirmation of compliance with Annex 2 requirements	15
3. Lettershop Services	The agency manages the entire mailing process (QR bills, follow-up letters, personalised documents) after the phone contact, including production, logistics, and reporting.	Process description, Workflows	15
4. Personnel Capacity and Team Structure	All three national languages are covered, and capacity for the expected volumes is guaranteed Call Agents are available to speak Swiss German, French and Italian	Team description Staff profiles Organisational chart	15
5. Data Protection	An ADV (Data Processing Agreement) is in place or can be concluded; the agency operates under a structured data protection and security concept.	Data protection concept (if available) Confirmation of willingness to conclude an ADV	5

Any bidders scoring **below 50 points** in the technical evaluation, will be automatically dropped from this procurement process.

9.1.3 Evaluation of Financial offers

Once the technical evaluation scoring is final, the TEC will be processed with the Financial offers evaluation.

Requirements	Documentary evidence	Weighting points
Financial offer according to instructions in PART 2 of this document	Financial offer in CHF	30

9.1.4 Submission of bids

Bids must be submitted via email in electronic format only. The Technical and financial offers should be submitted in separate password protected files. The third file containing the passwords should be open without password.

The **technical offer** shall contain:

1. **Signed Eligibility Documentation Form³** – as per ELIGIBILITY DOCUMENTATION PART 1 below
2. Bidders have to supply the technical offer, accompanied by the following proof/documentation mentioned in the technical requirement table above (article 9.1.2) under the column 'Documentary Evidence', such as:
 - Telemarketing Expertise
 - Technical Requirements
 - Lettershop Services
 - Personnel Capacity and Team Structure
 - Data Protection

The name of the file should have the bidder's name, Reference No, and the text 'Eligibility and Technical offer documents' (for example, **Agency Name OC-0002-MC eligibility and technical offer documents**).
And

The **financial offer** shall contain:

1. **Filled and signed Financial Offer form** - as per PART 2 - Financial offer below in this document.

The name of the file should have the bidder's name, Reference No, and the text 'Financial offer documents' (for example, **Agency Name OC-0002-MC financial offer documents**).

The **Password file** should have the bidder's name, Reference No, and the text 'passwords' (for example, **Agency Name OC-0002-MC passwords**).

The **subject of the email** should contain only the PRF reference number (**OC-0002-MC**).

³ Electronic copies of eligibility documentation should be provided only by the winning bidder prior to contract signing.

The body of the email should contain the bidder's official name, address, and telephone number.

Offers and file with passwords must be submitted in German or in English to the following email address only: procurement.HO@helvetas.org. Offers submitted after the deadline mentioned under point 2, Timetable of this RFP, will not be considered. The counted official receipt time is the time shown on the email received from the bidder.

10. Contract award

Contract will be awarded to the economically most advantageous offer. The economically most advantageous offer is determined through a one-stage evaluation process by weighing technical quality against price on a 70/30 basis. The financial offer scoring will be evaluated using the 'Relative Cost Scoring' method.

Helvetas will award framework agreements to a maximum of three top-scoring bidders. Once the agreement is signed, the selection of bidders for services will be based on the lowest price for each package in the financial offer. For instance, for package one (1. Welcome calls), the bidder with the lowest price will be chosen first. If unavailable, the next lowest bidder will be contacted.

Helvetas may waive this approach only if there are dependencies between packages during service delivery.

After evaluating the offers, Helvetas reserves the right to enter into negotiations with all or part of the eligible bidders to amend and/or complete their original offers.

Helvetas reserves the right to contract only part of the required services or cancel this tender procedure should it not be satisfied with the quality of offers.

11. Modification or withdrawal of bids

Bidders may modify or withdraw their bids in writing before the deadline for submission. No modifications are permitted after this deadline.

Helvetas retains ownership of all bids that have not been withdrawn. Bidders have no right to claim the return of their bids.

12. Validity of offers

Bidders are bound by their tenders for 180 days after the deadline for submitting offers. In exceptional cases, before the period of validity expires, Helvetas may ask bidders to extend the period of validity for a specific number of days, which may not exceed 40.

13. Signature of the contract(s)

Within 10 working days of receipt of the contract already signed by Helvetas, the selected bidder shall sign and date the contract. Failure of the selected bidder to comply with this requirement may constitute grounds for annulling the decision to award the contract. In this event, Helvetas may award the tender to another bidder or cancel the tender procedure.

14. Terms of payments

Helvetas in Switzerland is a payer of value added tax (VAT). Prices in the application must be submitted, taking into account all expenses.

The payment will be made via bank account transfer to the winner of the tender in CHF within a maximum of 30 working days from the date of acceptance of goods or execution of services or works. Cases of non-performance of obligation and their legal consequences will be separately indicated in the contract.

15. Terms of cooperation

Helvetas has the right to choose a supplier/ implementer on the given offer according to its own discretion. Helvetas has the right to re-formulate the Request for Quotation (RFQ), Invitation to Bid (ITB) or Request for Proposal (RFP) to its own discretion, if any additional items are needed.

16. Ethics clauses/Corruptive practices

Attempts to obtain confidential information, enter into illegal agreements with competitors or influence the evaluation team or Helvetas will result in exclusion from the procedure and, if necessary, further sanctions.

Bidders must not have any conflicts of interest with other bidders or parties involved in the project implementation.

Helvetas reserves the right to suspend or terminate the tender procedure or a contract that has been awarded if corruption is detected at any stage.

If it is determined that a contract was awarded or executed on the basis of so-called unusual commercial expenses (e.g. undeclared commissions, payments to offshore recipients, fictitious invoices), the contract may be cancelled and the responsible suppliers sanctioned.

Helvetas may suspend or cancel the procedure if substantial errors, irregularities or fraud are detected – even after the contract has been awarded.

17. Contract language

All written communications within the scope of this tendering procedure and all contract documents must be written in German or English.

18. Further information

The conclusion of the procedure and the award of a contract are subject to the availability of financial resources.

Helvetas reserves the right to cancel this award procedure at any time and without giving reasons – without any resulting obligations.

PART 1 - ELIGIBILITY DOCUMENTATION FORM

LIST OF REQUIRED DOCUMENTS

Eligibility criteria

Requirements	Documentary evidence
Legal registration	Certificate of incorporation or business registration issued by the relevant authorities, or any other relevant evidence. (e.g. "Excerpt from the Swiss Commercial Register".)
No pending legal/financial issues	Signed & dated Affidavit or Declaration of Honor by CEO/legal representative confirming no open case of a dispute, an execution procedure, a reorganization, a bankruptcy, or an insolvency procedure ⁴
Sustainability and quality assurance. Approach to ethics and data protection (FADP – Federal Act on Data Protection)	Data protection concept, ethics guidelines, or any other relevant evidence.
Minimum 5 years in operation	Ensure the entity's first registration date is provided in the certificate of incorporation or business registration issued by the relevant authorities.

STATEMENT

I, the undersigned hereby declare that we have in possession all documents listed above. All documents are valid as requested in the table above and hard copies or electronic copies can be distributed as/when needed.

Signed on behalf of the bidder

Name	
Signature	
Date	

⁴ Helvetas reserves the right to do a background check if needed

PART 2 - FINANCIAL OFFER

The Financial offer must be presented in CHF per package. Each package is described in detail, and based on these details, the bidder should provide the total amount in CHF for each package. The fees proposed in this offer should be all-inclusive for the services stipulated below. The bidder is responsible for all other taxes and duties in compliance with relevant legislation.

Services item – specifications – 5 packages	Weight	CHF
<p>1. Welcome Calls (package 1)</p> <ul style="list-style-type: none"> • Objective: Welcome new donors, provide information about Helvetas and the use of donations, upgrade donors to members. • Volume: 6,500 addresses provided, of which 1,350 with phone numbers; after enrichment approx. 3,800; 1,900 conversations, 1,500 net contacts (completed calls) per year. • Follow-up-mailing: 3 types of letters, each in 3 languages, Total 650 per year, mailing ongoing. Costs exclude postage. • Languages: German, French and Italian • Tasks of the agency: <ul style="list-style-type: none"> ○ Address enrichment (electronic and manual). ○ Telephone contact according to Helvetas guidelines. ○ Packaging and mailing of accompanying materials. ○ Reporting. • Accompanying materials: Helvetas provides print-ready PDFs, letterhead and envelopes. The agency charges for packaging and mailing. 	8	
<p>2. Reactivation Calls (package 2)</p> <ul style="list-style-type: none"> • Objective: Win back donors who have not donated for a long time. • Volume: 18,000 addresses provided, 8,500 conversations, 5,800 net contacts (completed calls). • Follow-up-mailing: 3 types of letters, each in 3 languages, Total 2'600 per year, mailing ongoing. Costs exclude postage. • Languages: German, French and Italian • Distribution: One campaign per year lasting approx. 3 weeks (April/May). • Tasks of the agency: <ul style="list-style-type: none"> ○ Address verification and updating. ○ Telephone contact with persuasive argumentation. ○ Mailing of information materials. ○ Reporting. • Accompanying materials: Helvetas provides PDFs, letterhead and envelopes. The agency handles packaging and mailing. 	8	

<p>3. Calls for Reactivation and Development of High Donors (package 3)</p> <ul style="list-style-type: none"> • Objective: In-depth conversations to develop existing donors. • Volume: <ul style="list-style-type: none"> ○ Reactivation January (WEMP programme partners who have not yet donated): 50 addresses, approx. 75 % conversations. ○ Reactivation February, May and August (High Donors without donation > 500 in the last 12–18 months): total 2,400 addresses, 52% conversations, 1,248 net contacts. ○ Follow-up-mailing: 5 types of letters, each in 2 languages, Total 499 per campaign, mailing ongoing. Costs exclude postage. ○ Languages: German, French • Tasks of the agency: <ul style="list-style-type: none"> ○ Address enrichment (electronic and manual). ○ Conduct conversations according to Helvetas guidelines. ○ Reporting ○ Send follow-up materials. 	6	
<p>4. Follow-up Calls Women Empowerment (WEMP) Renewal/Acquisition Mailing (package 4)</p> <ul style="list-style-type: none"> • Objective: Solicit donations from interested individuals who have not yet responded to the WEMP mailing. • Volume: <ul style="list-style-type: none"> ○ Follow-up November/December (WEMP interested parties who have not yet donated): 900 addresses, 50% conversations, 378 net contacts. ○ Follow-up-mailing: 3 types of letters, each in 2 languages, Total 151 per campaign, mailing ongoing. Costs exclude postage. ○ Languages: German, French • Tasks of the agency: <ul style="list-style-type: none"> ○ Address enrichment (electronic and manual). ○ Conduct conversations according to Helvetas guidelines. ○ Reporting ○ Send follow-up materials. 	6	
<p>5. Follow-up on Legacy Event Invitations (package 5)</p> <ul style="list-style-type: none"> • Objective: Follow up on invitations to legacy events, obtain direct confirmation of attendance, ask for reason in case of decline. • Volume: 5,000 addresses, approx. 20% with phone numbers (rest will be enriched). 2,200 gross contacts, expected 990 conversations, of which 841 net contacts (acceptance or decline). • Duration: approx. 2–3 weeks. • Languages: German and French. • Tasks of the agency: <ul style="list-style-type: none"> ○ Address enrichment (electronic and, if necessary, manual). ○ Telephone contact according to Helvetas guidelines. ○ No follow-up letter planned. ○ Regular address return (twice weekly) ○ Reporting on contact numbers and success rate. 	2	

Signed on behalf of the bidder

Name	
Signature	
Date	

Annex 1

TERMS OF REFERENCE

Contract-no: TBD

Project/mandate no: TBD

Project/mandate name/country: Switzerland

Client: **HELVETAS Swiss Intercooperation**
Weinbergstr. 22a, P.O. Box, 8021 Zurich, Switzerland

Contract term From: 01.01.2027 To: 01.01.2031

Hintergrund

Helvetas nutzt Telemarketing als wichtigen Kanal zur Pflege und Entwicklung von Spenderbeziehungen. Die Leistungen umfassen Welcome Calls, Reaktivierungsanrufe, WEMP-Calls und Legate-Calls. Ziel ist es, Spenderbindung zu stärken, inaktive Spender zurückzugewinnen und zusätzliche Potenziale zu erschließen.

Leistungsumfang nach Bereich

1. Welcome Calls

- **Ziel:** Begrüssung neuer Spender:innen, Information über Helvetas und Spendenverwendung, Upgrade der Spender:innen zu Mitgliedern
- **Volumen:** 6'500 Adressen angeliefert, davon 1350 mit Telefonnummer, nach Anreicherung ca. 3800, 1'900 Gespräche, 1'500 Nettokontakte (abgeschlossene Telefongespräche) pro Jahr
- **Nachfolgeversand:** 3 Briefversionen, jede in 3 Sprachen, Total 650s pro Jahr, laufend. Ohne Porti.
- **Sprachen:** Deutsch, Französisch, Italienisch
- **Verteilung:** Ganzjährig in wöchentlichen Wellen.
- **Aufgaben der Agentur:**
 - Adressanreicherung (elektronisch und manuell).
 - Telefonische Kontaktaufnahme gemäss Helvetas-Leitfaden.
 - Konfektionierung und Postaufgabe von Begleitmaterialien.
 - Reporting
- **Begleitmaterialien:** Helvetas liefert druckfertige PDFs, Briefpapier und Couverts. Die Agentur verrechnet Verpackung und Versand

2. Reaktivierungsanrufe

- **Ziel:** Rückgewinnung von Spender:innen, die länger nicht mehr gespendet haben.
- **Volumen:** 18'000 angelieferte Adressen, 8'500 Gespräche, 5'800 Nettokontakte
- **Nachfolgeversand:** 5 Briefversionen, jede in 2 Sprachen, Total 2600 pro Jahr, laufend. Ohne Porti.
- **Sprachen:** Deutsch, Französisch, Italienisch
- **Verteilung:** Eine Kampagne pro Jahr mit einer Laufzeit von ca. 3 Wochen (April/Mai)
- **Aufgaben der Agentur:**
 - Adressprüfung und Aktualisierung.
 - Telefonische Kontaktaufnahme mit überzeugender Argumentation.
 - Versand von Informationsmaterialien.
 - Reporting
- **Begleitmaterialien:** Helvetas liefert PDFs, Briefpapier und Couverts.
 - Die Agentur übernimmt Konfektionierung und Postaufgabe.

3. Calls für die Reaktivierung und Entwicklung von High Donors

- **Ziel:** Vertiefende Gespräche zur Entwicklung bestehender Spender:innen.
- **Volumen:**
 - a. Reaktivierung Januar (WEMP Programmpartner:innen, die noch nicht gespendet haben): 50 Adressen, ca. 75 % Gespräche
 - b. Reaktivierung Februar, Mai und August: (High Donors ohne Spende > 500 in den letzten 12-18 Monaten): total 2'400 Adressen, 52 % Gespräche, 1'248 Nettokontakte (abgeschlossene Telefongespräche)
- **Nachfolgeversand:** 5 Briefversionen, jede in 2 Sprachen, Total 499 pro Jahr, laufend. Ohne Porti.
- **Sprachen:** Deutsch, Französisch
- **Aufgaben der Agentur:**
 - Adressanreicherung (elektronisch und manuell).
 - Durchführung von Gesprächen nach Helvetas-Leitfaden.
 - Reporting
 - Versand von Follow-up-Materialien.

4. Calls Nachfassen Women Empowerment (WEMP) Renewal-/Akquise-Mailing

- **Ziel:** Spendenaufruf bei interessierten Personen, die noch nicht auf das WEMP-Mailing reagiert haben.
- **Volumen:** Nachfassen November/Dezember (WEMP Interessierte, die noch nicht gespendet haben): 900 Adressen, 50 % Gespräche, 378 Nettokontakte.
- **Nachfolgeversand:** 3 Briefversionen, jede in 2 Sprachen, Total 151 pro Kampagne, laufend. Ohne Porti.
- **Sprachen:** Deutsch, Französisch,
- **Aufgaben der Agentur:**
 - Adressanreicherung (elektronisch und manuell).
 - Durchführung von Gesprächen nach Helvetas-Leitfaden.
 - Reporting
 - Versand von Follow-up-Materialien.

5. Nachfassen von Legate-Event-Einladungen

- **Ziel:** Nachfassen von Einladungen zu Nachlass-Events, direkte Zusage für die Teilnahme, bei Absage Grund erfragen.
- **Volumen:** 5'000 Adressen, davon ca. 20 % mit Telefonnummer (Rest wird angereichert). 2'200 Bruttokontakte, erwartete 990 Gespräche, davon 841 Nettokontakte (Zu- oder Absage).
- **Dauer:** ca. 2–3 Wochen.
- **Sprachen:** Deutsch und Französisch.
- **Aufgaben der Agentur:**
 - Adressanreicherung (elektronisch und ggf. manuell).
 - Telefonische Kontaktaufnahme gemäss Helvetas-Leitfaden.
 - Kein Folgebrief vorgesehen.
 - Regelmässige Adressrücklieferung (2× wöchentlich).
 - Reporting zu Kontaktzahlen und Erfolgsquote.

Annex 2

TECHNISCHE ANFORDERUNGEN

Hauptanforderungen Zusammengefasst:

- Kann CSV-Dateien verarbeiten im System
- File-Austausch nur via sicheren Server FTP oder SFTP
- Kann ab Zahlungsreferenzen QR Bills generieren

Anforderungen im Detail inkl. Prozessbeschreibung

Kampagnen Arten:

- On-Going Campaigns (Donor Journey)
- Emergency Campaigns
- Div. Kampagnen gem. Plan (WEMP-Renewal, Reaktivierung, Akquise)

Prozess und Anforderungen Data-Team

- On-Going Kampagnen und Emergency Kampagnen werden initial aufgesetzt und automatisiert via einem von dem Partner zur Verfügung gestellten sicheren Server (FTP oder SFTP) angeliefert. Für potenzielle Notfallkampagnen stellt Helvetas eine Liste mit 10'000 Kontakten zur Verfügung. Diese Liste wird monatlich geliefert und somit kann der Partner bei Bedarf rasch eine Kampagne lancieren.
- Für div. Kampagnen erfolgt pro Kampagne ein Kick-Off Meeting zwischen Partner/Data-Team (ca. 1 Monat vor Kampagnen Start, bei neuen Prozessen je nach Komplexität früher)

Anlieferung der Daten durch Data-Team

- Je nach Kampagne werden via sicherem Server (FTP oder SFTP) pro pot. Spendendem 1 bis 2 QR-Rechnungsreferenzen angeliefert (für Spende oder regelmässige Spende/Mitgliedschaft). Alle Referenzen werden in einem CSV-File angeliefert.
- Für pot. Neu-Spendende wird ein Code für eine unreferenzierte QR-Rechnung definiert.

Verarbeitung-Daten/Telefonie der Kontakte und Rücklieferung der Daten durch Partner

- Der Telemarketing Partner generiert die QR-Rechnungen und verschickt sie bei Zusage.
- Der Telemarketing Partner fasst die Resultate in einem CSV zusammen und sendet sie via sicherem Server (FTP oder SFTP) zurück
Das CSV umfasst:
 - Angaben zum Spender gem. angelieferten Daten

- Kontaktdatum
- Die Reaktion der pot. Spendenden (z.B. nicht erreicht, Zusage Spende, ..). Für die Reaktionen werden Resultat-Codes definiert (siehe Tabelle Beispiel Resultat Codes)
- Neuspender werden erfasst
- Adresse/Namensänderungen werden vermerkt (z.B. zusätzliche Spalte)
- Spendenbetrag
- Behandlungswünsche (keine Verdankung, keine Telefone, etc.)
- Rücklieferung der Daten an Data-Team erfolgt spät. 2 Wochen nach Ende der Kampagne

Beispiel Resultat Codes:

10	Not reached
11	Not called
12	Block Person
13	Wrong Phone Number
14	Died
21	No Interest

Häufige Struktur der von Helvetas angelieferten CSV-Files:

'Entity', 'Number', 'Academic Title', 'Official Title', 'Language', 'Salutation', 'Lastname', 'Firstname', 'Organization_HH', 'Line1', 'Line2', 'Line3', 'Line4', 'Line5', 'Line6', 'Account Type', 'Address Suffix', 'Street', 'Street Name', 'House Number', 'Postoffice Box', 'Postal Code', 'City', 'Country', 'Letter Salutation', 'Campaign ID', 'Campaign Activity ID', 'QR Bill Reference', 'Datamatrix Code', 'QR IBAN', 'Donations Current Year', 'Donations Last Year', 'Donations Penultimate Year', 'Years since First Transaction', 'First donation on', 'Last donation on', 'Amount last donation', 'Highest donation', 'Mobile Phone', 'Phone', 'Subject'.