

## **Telephone Agency Support | Scope of Work**

### **Appendix to Request for Proposal**

One of the priorities for RESCUE in Sweden is to recruit and retain monthly donors to support the organization's work via direct debit (autogiro).

RESCUE is therefore looking for a telemarketing partner to support the organization for the next 2 years with the possibility of continuation after that.

#### **Scope**

We are seeking support from a telemarketing agency in the following areas:

#### **1 Proposal requirements**

##### **Period of Performance**

This SOW shall commence on January 1<sup>st</sup> 2026, and run for 2 years, although a 1-year break clause will be included for both parties.

Our aim is to focus on four main areas throughout the period of this contract: Sustainer Conversion calling to our current cash donors or prospects, Sustainer upgrades, Sustainer reactivations and potentially Welcome calls to new donors (depending on result of an evaluation) and other calls upon agreement.

##### **Place of Performance**

You will be calling on behalf of the RESCUE Sverige. You will not be expected to perform any operations from the client office (in Stockholm) however, in person strategy setting and review meetings may be possible.

##### **Work Requirements**

###### ***Purpose:***

To forge a meaningful partnership with an external telemarketing agency to help develop and deliver a new telemarketing strategy, covering creative script and supporter journey development, optimized calling strategies and reporting and analysis for new supporter acquisition & retention programs. The selected agency partner will be responsible for managing all aspects of the IRC's telemarketing activity, that in turn support our fundraising KPIs and budget targets.

###### ***Objectives:***

##### **RESCUE TM Calling strategies**

- Work alongside RESCUE to help us better understand what type of calling, to whom and when is the most effective time to make these calls.
- Ensure efficient use of RESCUE budget to maximize Supporter loyalty and LTV from all Supporters called.

##### **Calls to prospects, cash donors and sustainers**

- Call current cash donors or prospects within 7 days after receiving the file with the goal to convert to sustainers.

- Call current sustainers within one month after receiving the file with the goal to upgrade their monthly donation.
- Call cancelled sustainers within one month after receiving the file with the goal to reactivate them to sustainers.
- Perform reminder calls and sms within the timespan agreed for each segment.
- Call new sustainers within 7 days after receiving the file to welcome them and build trust with the aim to increase the retention rate.
- Other calls and goals upon agreement.
- Handle digital & postal mailings related to the calls.

### **Test and Learn Plans**

- Initiate testing strategies to help drive improved penetration rates, encourage higher conversion and activation rates, increase average gift value, and maximize revenue / ROI.
- Analyse tests including initial call to actions, ask type, scripts and time of calling and optimize the points in our Supporter Journeys when supporters are contacted via TM to ensure we are on track with budget and KPI requirements set out in an annualized plan.

### **Reporting & Continuous Improvement**

- Provide ongoing reports to monitor KPIs and track pacing to goals.
- Present end of campaign reviews to evaluate performance and align strategic recommendations to optimize telemarketing programs and strategy
- Advice on sector, TM specific trends.

### **Project Management**

- Ensure all agency staff have regular training sessions with regard to the RESCUE cause.
- Ensure regular call listening sessions are in place to help monitor quality of calling – both for recognition of excellent service and for when additional training or support is required.
- Ensure regular call recordings are provided to help monitor quality of calling – both for recognition of excellent service and for when additional training or support is required.
- Ensure records are kept securely and files are accurately updated with any special actions, before the returning of files to the RESCUE CRM.
- Ensure suppressions of any supporter records are adhered during calling campaigns.
- Present campaign briefs to include creative overview, new scripts, file segmentation recommendations, optimized calling times, suggested type of calling to support RESCUE TM campaigns.
- Ensure all files are filled according to instructions and advice on improvements.
- Ensure timely and accurate invoicing for all activity.

### **Compliance / Governance**

- Advise on best practice and ensure full compliance with current sector regulatory guidance and according to Giva Sverige guidelines.
- Compliance processes – ensure regular training and monitoring with regards to ensuring compliance with Swedish Marketing law and according to fundraising guidelines.
- Ensure high levels of data security according to GDPR.

### **Meetings and Approvals**

- Monthly status meeting with the RESCUE to review campaigns and discuss upcoming projects.

- Ad-hoc meetings with RESCUE to develop and review plans as needed.

## 2 Schedule / Milestones

We would like to sign an agreement in time to facilitate the effective set up for calling to commence in late January 2026. As leads in times for the recruitment, training and setting up of any activity can normally take up to 1 month, we would like to sign an agreement one month beforehand.

## 3 Acceptance Criteria

Recommendations made by the telemarketing agency will ultimately be signed off by the Associate Director, Fundraising Programs, Julia Gerestrand.

Recommendations must be in line with the agreed strategic approach and delivering against the agreed KPIs.

Below we are giving an estimate of activity type and volumes. This might be subject to change depending on results, priorities and other factors. We are interested in understanding your ability to accept smaller files for specific calls given that additional tactics are developed. This could be saving calls, mid value donor calls etc.

### An example of typical volumes to be expected in a calendar year:

	Type of activity	Frequency	Service type	Number of records per year	
1	Sustainer Conversion (One-Time to Sustainer)	Rolling campaigns every month (weekly files)	Outbound Fundraising	3,000 min	10,000 max
2	Sustainer Upgrade (Upgrading Monthly Value)	Rolling campaigns every month	Outbound Fundraising	15,000 min	30,000 max
3	Sustainer Reactivation (Reactivating Lapsed Sustainers)	Rolling campaigns every month	Outbound Fundraising	1,000 min	7,000 max
4	Reminder Calls	Rolling weekly	Outbound Fundraising	20 min	1,500 max
5	Welcome Calls TBA	Rolling twice a week	Outbound Engagement	10,000 min	18,000 max
6	Saving Calls TBA	Rolling weekly	Outbound Fundraising	200 min	1,200 max
7	Bulk-conversion	Twice a year	Outbound Fundraising	1,000 min	10,000 max

### Campaign requirements

- Schedules: Calling schedules to be agreed

- Data transfer: Weekly data transfers / API for daily transfers
- Reporting: Daily, weekly and campaign end reporting. Every campaign should be reported to the organisation in an agreed manner. The agency should every week be available for discussion on the results and be ready to come up with suggestions on how they might be optimised.
- Call listening: Campaign call recording schedule agreed with regular recordings sent to RESCUE for feedback
- Follow-up mailing administration: administer the follow-up mailings to donors after the phone call (may include but are not limited to personalized letters and direct debit mandates, response envelopes).
- Phone number look-up: if necessary, manage the completion of phone number to names and addresses sent to the agency.

### **Other**

This procurement covers telemarketing. However, we are interested in knowing if you also offer services within donor services such as, but not limited to, answering donor questions by inbound calls, responding to donor e-mails, supporting donors with starting, changing and terminating their monthly gift, proactive saving calls, administration of memorial gifts etc.

<b>Evaluation criteria</b>
Competence of team on telephone fundraising campaign management.
Competence of team on other areas of work described in this document.
Documented results of increasing fundraising results when working with other fundraising organizations.
Availability and flexibility, including preparedness for emergency fundraising and availability during year-end and summer seasons.
Flexibility to accept smaller files for specific calls upon request.
Price. Please specify your pricing model as well as your price in SEK for each call type listed above.