



Annex A: Terms of Reference
RFP/2017/831
Request for Proposal for providing services to support Individual Giving fundraising

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1 Introduction

1.1 Background

UNHCR www.unhcr.org

UNHCR, the UN Refugee Agency, is the world's leading organization dedicated to saving lives, protecting rights and building a better future for refugees.

UNHCR operates in the field in over 128 countries, using its expertise to protect and care for refugees, returnees, internally displaced people and stateless persons.

UNHCR leads international action to protect people forced to flee their homes because of conflict and persecution. It delivers life-saving assistance like shelter, food and water.

UNHCR helps safeguard fundamental human rights and develop solutions that ensure people have a safe place to call home where they can build a better future.

Global refugee situation:

Forced displacement, most of it arising from war and conflict, has risen sharply in the past decade, largely a result of the Syria crisis, but also due to a proliferation of new displacement situations and unresolved old ones. Some 65.3 million people are today forcibly displaced, of which 21.3 million are refugees who have been forced to flee across international borders, and the rest are people displaced within their own countries.

Private sector partnerships (PSP):

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In 2017, UNHCR needs USD 7.309 billion for its global work. This amount is set to grow with current conflicts fuelling displacement.

UNHCR has the fastest growing international private sector fundraising programme in the world with ambitious targets. By 2018 UNHCR aims to raise US\$500 million from 2.5 million donors and to have 5 million supporters.

In 2015 private sector fundraising contributed 8% to the overall budget of the organisation with the rest coming from governments. UNHCR has private sector fundraising programmes in 27 countries, including the UK, Italy, South Korea, Hong Kong, Canada, Mexico and Brazil.

In six of these countries, UNHCR has partnerships with independent charitable organizations (known as: National Partners). National Partners raise funds for UNHCR and awareness of the refugee cause. They use the UNHCR brand for fundraising purposes and engage directly with donors. UNHCR National Partners operate in: Australia (Australia for UNHCR), Germany (UNO Flüchtlingshilfe), Japan (Japan for UNHCR), Spain (España con Acnur), Sweden (Sweden for UNHCR) and the USA (USA for UNHCR).

Individual Giving

Individual giving is defined as voluntary income given by individual members of the public up to a cumulative value of \$10,000 in a year. Individual Giving accounts for 65-70% of PSP's total income raised annually equating to approximately \$220 million in 2016.

PSP has achieved rapid growth since 2008 recruiting donors primarily via face-to-face (on the street canvassing), though in recent years greater emphasis has been placed on recruiting donors through digital channels and DRTV. Approximately two thirds of donors globally are recruited directly on to monthly/sustainer giving and by the end of 2016 there were 1.7 million active (donated in last 12 months) donors globally.

With such a large donor base in place there is a requirement to improve donor retention and increase average value per donor through donor development. In recent years fundraising agencies have been used by the International Individual Giving team at a global level to support Individual Giving activity, and in some circumstances at a market level to develop and implement specific campaigns.

Examples of some Individual Giving fundraising services recently provided through agencies:

1. Development of a first year retention program

Anything up to 50% of newly acquired monthly donors can attrite in the first year, depending on the market. PSP worked with a fundraising/direct marketing agency to develop a first year retention program aimed at improving retention on average by 5%. The program has been developed utilising both online and offline elements and is being tested in a number of markets. Refer to the appendix with visuals.

2. Creation of best practice guidance for middle donors

The middle donor income stream, those that give between \$1,000 and \$10,000 per annum, has been identified by PSP as a priority to increase long term individual giving income and to act as a feeder pool to the major donor program.

PSP worked with a fundraising agency/direct marketing to develop best practice guidance for setting up and implementing a middle donor program, which markets can adapt to local needs. This guidance was supplied with suggested communication plans and templates. The guidelines were developed in collaboration with 3 markets (Australia, the US, and the MENA region) and implementation supported with workshops.

3. Campaign development for cold acquisition

In 2016, the UK office wanted to test cold direct mail and press inserts to recruit higher value cash donors. A fundraising/direct marketing agency was used to develop the overall campaign including creative development, media planning and buying, and print and production. Refer to the appendix with visuals.

4. Global Shelter campaign

In 2015 a fundraising agency/direct marketing was used to develop the concept, name and visual identity for PSP's first multi-year fundraising campaign (www.nobodyleftoutside.org). This agency was then used to develop the accompanying fundraising assets for markets to adapt for local use. These assets



included a campaign specific brand book, face-to-face fundraising materials, e-appeals, telemarketing scripts, press adverts, digital marketing assets and infographics. Refer to annex E for visuals.

1.2 Statement of Purpose & Objectives

UNHCR is seeking to enter into a Frame Agreement contract with Agencies specialized in fundraising/direct marketing services to support Individual Giving fundraising.

With the needs of refugees growing, UNHCR has to be ahead of the game in Individual Giving fundraising and is seeking industry leading agencies (up to three) to partner with.

The Frame Agreement will be signed with the successful bidders for three (3) years.

2 Requirements

2.1 Core requirements

The following outlines the types of projects that may be required by agencies selected:

- development of fundraising products, for example a high value regular giving/sustainer product;
- development of multi-year global campaigns;
- development of projects and programs to support donor acquisition, retention and development.
- development of donor acquisition campaigns through multiple channels: press, cold direct mail, digital etc. for one or more offices;
- development of donor appeals and stewardship materials via direct mail and email for one or more offices;
- development of advocacy campaigns to recruit supporters and engage existing donors.

The following outlines the types of agency services that may be required at either a global or local level. Note, for any project one or more services may be required using one or more channel e.g. direct mail, online, video etc.

2.1.1 Individual Giving campaign strategic support

To provide strategic advice to support the development of campaigns and products that may be focused on either/both fundraising and awareness. This may include best practice guidance.

2.1.2 Concept and creative development

To develop industry leading, stand out creative from concepts through to finished artwork and may encompass a number of assets, both digital and non-digital.

2.1.3 Media planning and buying

To make media recommendations for channel(s) as required and to negotiate the buying of approved media recommendations.

2.1.4 Print and production

To provide print and production services including data management – both paid for and client data.

2.1.5 Analysis and campaign evaluation

To provide data analysis and post campaign analysis, including recommendations to support future activity.

2.2 Other services, required for the performance of the key requirements

Agencies are expected to:

- Bring significant knowledge and a proven track record of developing successful and transformative fundraising and/or direct marketing B2C campaigns and products.
- Understand the parameters when creating fundraising/direct marketing campaigns and products across a number of markets: adaptability, language, culture etc.

2.3 Scenario

It is anticipated that there will be two (2) to three (3) global campaigns per year and up to 10 campaigns per year working with specific markets. Global campaigns/projects will primarily be developed in English.

2.4 Customer Responsibilities

UNHCR is responsible for providing the following:

- If in the Statement of Work (SoW) and purchase order (PO) resulting from the RFP travel is requested, UNHCR shall reimburse travel expenses. Travel and terminal expenses incurred by the Contractor's personnel shall be reimbursed by UNHCR in the amount of the actual expenses incurred by the Contractor's personnel as evidenced by original supporting document, provided however that UNHCR shall not be liable to reimburse travel expenses incurred in excess of the amount indicated in the relevant purchase order. The maximum amount permitted for travel in any purchase order shall be based on the cheapest economic airfare available as determined by the UNHCR Travel Unit.
- Access to PSP financial data, supporter data and fundraising results will be provided as required under terms of strict confidentiality only to the winning agencies.
- Meeting deadlines for approvals set in collaboration with the agency, providing timely feedback and dedication to a collaborative and creative approach to project delivery.

3 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

3.1 *Company Qualifications*

- A description of your company with evidence of your company's capacity to perform the services required, including:
 - Company profile,
 - Registration certificate
 - Last audit reports
- Experience of developing fundraising programs for Individual Giving. For those agencies that work with commercial clients demonstrate experience of working on B2C campaigns/projects. You are requested to provide a client list and from this list three (3) references that we may contact.
- Experience of developing fundraising/B2C campaigns internationally.

3.2 *Proposed Services*

- Demonstration that your company has a track record in delivering industry leading fundraising products and campaigns, and/or B2C direct marketing products and campaigns.
- Clear demonstration through case studies that your company has provided a number of the projects outlined under 'Requirements' in Section Two (2) within the last five (5) years, with an indication of the success.
- Clear demonstration through case studies that you have delivered services across a number of markets internationally, particularly those where PSP undertakes Individual Giving fundraising, and that you understand the complexities of this.
- Outline your company's approach to delivering best in class agency/client service.

3.3 *Personnel Qualifications*

A list of the core staff to be assigned to the UNHCR account.

3.4 *Vendor Registration Form*

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C).

3.5 *Applicable General Conditions*

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) including it in your submitted Technical Proposal.

4 Evaluation

4.1 Technical Evaluation

The **Technical offer** will be evaluated using the following criteria and percentage distribution: **70%** from the total score.

The technical evaluation will consist of two phases.

During the first phase of the evaluation, all bidders will be evaluated based on the below criteria and only those bidders reaching a minimum of 35 points out of 55 will be shortlisted for the second phase of the evaluation:

1.Company Qualifications	<ul style="list-style-type: none"> - Overall experience and time in business - Experience of working in the not-for-profit sector (with a particular focus on international development or humanitarian organisations) and in particular on individual giving projects. For those agencies that work with commercial clients, experience of working on B2C projects - Experience of working internationally across markets.
2.Quality of service	<ul style="list-style-type: none"> - Overall comprehensiveness of the written proposal against these TORs. - Demonstration through recent examples/case studies/topline results that you have undertaken similar projects as outlined in these TORs. For those agencies that work with commercial clients, demonstration should be of B2C projects that replicate those outlined in the TORs as closely as possible. - Demonstration through recent examples/case studies that you can provide the range of services required as outlined in these TORs.
3.Project staff	<ul style="list-style-type: none"> - Seniority and expertise of the key staff assigned to the account.
Total 1+2+3	Max.: 55 points

Shortlisted agencies will be asked to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via web/teleconference. This is expected to be one hour maximum. This presentation will form part of the second phase of the technical evaluation.

4.Quality of presentation	<ul style="list-style-type: none"> - Quality and clarity of the presentation at the WebEX.
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The minimum passing scores cumulatively from first and second phase of the evaluation is 42 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation. Please provide your cost proposal as per the requirements on Annex B of this tender and submit as a



separate document. Please note that there are two worksheets to complete. Worksheet one will be used for the evaluation but worksheet two must also be completed.

For the purpose of providing a quote please use the following scenario:

Please provide a quotation to develop to global campaign around a single theme. Quote to cover the development of assets through to artwork for: acquisition direct mail pack, banner ad, press ad and press insert, along with a direct mail pack and email to be sent to existing donors. Social media assets to be developed for both audiences.

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR will monitor the performance of the selected suppliers on a regular basis. Among the performance indicators, UNHCR will include the following:

- Quality of creative for campaigns and products
- Being culturally attuned to working across a number of markets
- Timely delivery of campaigns and products.
- Quality of account management service.
- Overall impact of the campaigns and products developed.

Depending on the level of activity going through the agencies at any one time, regular review meetings or calls will be undertaken.