

Annex A: Terms of Reference
RFP/2017/835

Request for Proposal for the development and implementation of a global lead
generation campaign

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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 125 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 and 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 64 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. Sadly, 51% of these are children.

Private sector partnerships (PSP):

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In 2017, UNHCR needs USD 7.3 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. Data is not yet available for 2016.

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 (Espana con Acnur), Sweden (Sweden for UNHCR) and the USA (USA for UNHCR).

This campaign will be managed by the Fundraising Communications Team within PSP who are based in Copenhagen. The team is committed to working in a collaborative and respectful way with any agency. Our approach includes open and honest communication, our availability whenever the agency requires input and a commitment to meet deadlines and

give timely feedback. We are very excited about the project and about creating an innovative and effective campaign.

Examples of some existing UNHCR public engagement/lead generation campaigns:

This is a relatively new area for UNHCR but there is great potential for development particularly with the current spotlight on refugee issues.

The following are some examples of current campaigns and public engagement activities. The lead generation activity will need to compliment and align with the first two current campaigns mentioned below.

1. Nobody Left Outside: current global fundraising campaign

UNHCR launched the Nobody Left Outside campaign (www.nobodyleftoutside.org) in May 2016. It is the first ever global fundraising campaign for UNHCR bringing together multiple fundraising markets around the common theme of shelter. In its first six months the campaign has raised over \$8 million.

The campaign aims to raise enough to shelter two million refugees by 2018. It also aims to increase UNHCR brand awareness and generate 1.5 million new contacts through a public engagement campaign/s.

There are 20 countries fundraising for the campaign over three years, engaging various donor types including individuals, philanthropists, foundations, and corporations. Those confirmed as taking part in the campaign so far are: Australia, Canada, Hong Kong, Italy, Greece, South Korea, Netherlands, Philippines, Sweden, Thailand, Singapore, France and Monaco, The Gulf States, Indonesia, Japan, Switzerland, UK and USA.

These countries are employing multiple channels including; direct mail, e-mail, direct response TV advertising, outdoor advertising, digital advertising, face-to-face fundraising, inserts, SMS appeals and telemarketing.

2. #WithRefugees and the Global Compact

UNHCR's #WithRefugees campaign (www.withrefugees.org). This is a global petition the first part of which was delivered to UN headquarters in New York at the UN Summit on Refugees and Migrants held on 19 September in 2016.

The petition asks governments to:

- Ensure every refugee child gets an education.
- Ensure every refugee family has somewhere safe to live (this asks links very clearly to the global shelter campaign).
- Ensure every refugee can work or learn new skills to make a positive contribution to their community.

The result of the summit was the 'New York Declaration', adopted by all 193 UN member states. This reaffirmed that protection principles and standards remain at the heart of the international response to refugee crises, and reiterated that responsibility-sharing and international solidarity are critical to securing protection in practice.

UNHCR is now tasked with initiating and developing a Comprehensive Refugee Response Framework (CRRF), which we will pilot in a few countries initially. Drawing on this experience, a Global Compact on Refugees, will be adopted in 2018. The CRRF therefore represents a significant opportunity to bring about real change as it will directly influence the Global Compact, and ensuring its success is a priority for UNHCR.

The objectives of the CRRF, as set out in the New York Declaration, are

- (i) to ease pressure upon host countries;
- (ii) to enhance refugee self-reliance;
- (iii) to expand access to third-country solutions; and
- (iv) to support conditions in countries of origin to support return in safety and dignity

The CRRF provides the practical elements of how this is to be done. Many of these are already a part of some refugee operations, but the CRRF aims to bring them together in a consistent, decisive, and predictable manner, while taking account of the specificities of each context. UNHCR's efforts are therefore focused at the local, national and regional levels, and adopt the whole-of-society approach.

In summary, the CRRF aims to achieve better sharing of responsibility among countries and better tools for preventing and addressing situations of mass displacement. It is a blueprint to look at situations in which there are large refugee movements with a view to bringing together all actors including business partners to address the situation in a holistic manner.

In the light of this, the #WithRefugees campaign has now been extended and will run until the global compact is signed in 2018.

3. Some successful regional examples:

<https://voices.unhcr.org/syria>

<https://www.youtube.com/watch?v=O0ndziaggtQ>

<https://www.unhcr.or.th/namjai4refugees/en>

4. Some global examples using UNHCR celebrity support (GWA)

[http://www.unhcr.org/refugeeday/what-they-took-with-them/
#WithRefugees](http://www.unhcr.org/refugeeday/what-they-took-with-them/#WithRefugees)

supporting

<https://www.youtube.com/watch?v=gd9BE7crEoc> supporting #NobodyLeftOutside

1.2 Statement of Purpose & Objectives

UNHCR is seeking to enter into a Contract with an agency specialized in public engagement/lead generation campaigns to develop an effective lead generation campaign.

The aim of this campaign is to meet the target of generating 1.5 million new leads (phone numbers as a priority and email addresses as a secondary objective) globally for the Nobody Left Outside campaign (as outlined above under point 1.1.1). However, please note that this campaign does not need to be branded Nobody Left Outside, it can have its own identity.

We are therefore looking for a proposition that will connect the aims of #WithRefugees and the Global Compact with the Shelter Campaign and the current solidarity for refugees.

This will be a global campaign meaning that the creative concept and assets will be developed by the agency in collaboration with the Private Sector Fundraising Headquarters in Copenhagen and then disseminated to our fundraising offices throughout the world. The national offices will then use the assets to launch the activity nationally. For this reason we need an agency with a global presence who has experience of running international campaigns in multiple countries. The concept therefore must have global appeal.

The majority of UNHCR's paid advertising campaigns over the next few years will run on digital channels, with some investment in DRTV and some offline channels such as Face-to-Face fundraising. This coupled with media consumption trends mean that an inherent understanding of digital channels is a fundamental requirement for any agency that wishes to respond to this RFP.

The agency appointed will be given significant creative freedom. However, it is vital that as well as generating a high volume of leads the activity must also generate a high quality of leads, meaning that they have the financial means to convert well when asked for a donation. Therefore any agency responding to this brief must demonstrate knowledge and understanding of campaigns with a very clear call to action with a strong conversion rate. The concept must also meet UNHCR messaging requirements as laid out in the organisation's Brand Book.

It is also important to note that the activity can raise the profile of UNHCR and build understanding and empathy for refugees but this is not the primary objective. This is not a campaign to gain media coverage alone, it is not to raise awareness or gain likes and shares, it is to gain leads. Once we have the concept we will work with our media teams to complement the campaign with media support.

It is also not a pure advocacy campaign. The Shelter campaign is not an advocacy campaign as it does not have a clear human rights message, it is about funding shelter so this needs to be kept in mind. Also the request to governments from #WithRefugees is to ensure every refugee family has somewhere safe to live which again is not a direct advocacy ask. Finally as we work collaboratively with governments we cannot be overtly political in our messaging.

One approach could be to target a particular refugee situation that we are currently responding to, for example the influx of South Sudanese refugees to Uganda and use this to really bring the public closer to the refugee response. We could have someone live from the field sharing information and reporting back. However, this is only one suggestion, we are very open to others and would welcome innovative suggestions.

Timing

This campaign is scheduled to launch in May so the concept and assets must be made available to markets by the beginning of May or earlier if possible. This is because the organisation is looking to build on the empathy and compassion that the public have shown for refugees. We want to harness the solidarity and momentum of activities like the women's march and turn it into new supporters for UNHCR. May is also the one year anniversary of the shelter campaign making it a timely moment.

Audience

We have active fundraising operations in 27 countries. However, the key markets for this activity are; USA, Spain, Australia, Canada, Hong Kong, Korea, Sweden, UK, Thailand, Brazil, Philippines, France, Netherlands and UAE. In terms of further profiling we know that our donors tend to be over 30 and an even mix of men and women and, as we want quality leads who convert well, we suggest targeting people over 30 as they have a higher propensity to donate.

2 Requirements

2.1 Core requirements

2.1.1 Concept development:

Development of a creative concept for a lead generation activity that will act as a device to obtain telephone numbers or email addresses from supporters for conversion to donors. It will need to be adaptable for cultural and language differences.

Please note the primary objective is not to gain media coverage or shares and likes. This would be a welcome by product but should not be the main outcome of the activity. The primary objective is the generation of quality leads.

The concept must also not trivialise or sensationalise the plight of refugees and therefore must have an appropriate tone – we cannot have Pokémon Go for refugees!

Some elements that the concept should include are as follows:

- Easy to execute/adapt in countries with different levels of digital penetration
- Generate quality leads i.e. those who will convert well to donors because they have the propensity to donate
- Create a high quantity of leads so it must have a very clear call to action which involves capturing contact details to follow up and convert to donors. It could also be a straight-to-donation campaign
- Designed with a built-in donor on-boarding/follow-up strategy and accompanying assets to convert leads to donors
- Adaptable to advertising formats across the main digital channels, including Facebook, Twitter, email, SEM, display advertising, mobile platforms including local digital platforms such as Line in Asia as well as some offline activities where applicable
- Also adaptable to off-line channels as some markets may be interested in using the concept for Face-to-Face fundraising campaigns or DRTV
- Adaptable for different languages and cultural contexts as they will be used in up to 20 different countries from Asia, Australia, Europe, Americas, Middle East and North Africa
- Support UNHCR's key brand attributes which are; we get things done, make a difference in people's lives and can be trusted – so nothing too flippant and ideally something that builds empathy/solidarity with refugees

2.1.2 Production of the accompanying assets:

Along with the creative concept we require the production of the following accompanying assets:

- Videos, ads, content and/or whatever else is required to support the creative concept. This must be easily adaptable for different countries/languages and focused on getting leads.
- Adaptable assets to support the promotion and marketing of the lead generation activity across digital channels in multiple markets, including, but

not limited to; Facebook, Twitter, e-mail (for existing donors as well as to acquire new contacts), SEM, SEO, display ads (including real-time bidding and re-targeting) and website landing pages.

- Development and production of supporting on-boarding/conversion and follow up assets – for example some markets may want to test immediate telemarketing conversion against a communication cycle or to cultivate leads that we are not able to convert straight away so all these elements needs to be thought through in light of different market contexts and giving patterns.

2.1.3 Development of a marketing strategy:

We would like the agency to come up with a marketing strategy to indicate to participating markets how to employ the creative concept, accompanying assets, promotional assets and conversion assets.

The strategy should be primarily digital and include social media marketing but include how it could be adapted for other promotional channels as appropriate.

It should also build in guidance on tracking, reporting, monitoring, analysis and optimization of channels once the concept is live. Many markets employ a digital media buying agency so this strategy will also inform local agencies.

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

2.2.1 Agency credentials required:

- The agency must have a global presence and experience of carrying out similar campaigns in multiple countries around the world shown through past work and client references
- Bring significant knowledge and experience of developing successful public engagement and lead generation activities in multiple countries and have developed a sector-leading reputation for these initiatives
- Core digital competency shown through past work and client references
- A proven track record of delivering successful lead generation campaigns that employ current digital marketing channels, including design of a clear conversion strategy
- Relevant experience of working on non-profit campaigns to gain leads or action
- Experience of strategically utilizing celebrities, both in terms of the creatives but also in terms of related online promotion and PR
- Experience in conceiving of and producing globally adaptable digital assets to back up a creative idea
- Be able to work closely with staff in the Private Sector Partnership service (PSP) in Copenhagen and with key stakeholders across the UNHCR network in a collaborative and creative working environment
- Have the capacity to adapt creatives as needed once live testing of any public engagement activity begins

2.3 Scenario

The agencies will be expected to work on this project as soon as they are contracted in order to deliver the activity by May 2017.

2.4 Customer Responsibilities

The UNHCR is responsible for:

- Working with the selected agency to develop a full project brief.
- Meeting deadlines set in collaboration with the agency, providing timely feedback and dedication to a collaborative and creative approach to project delivery.
- Availability for work sessions, brainstorming and any other requirements of the agency in order to deliver the project.
- 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.

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
- Please specify the location of the company's headquarters, and the branches that will be involved in the project work
- Examples of similar projects with results
- Number of similar projects currently underway
- Any relevant experience working with non-profit organizations preferably in a number of different markets
- You are requested to provide three references that we may contact from your current client list

3.2 *Proposed Services*

- An outline of your approach to this project
- A draft or a number of draft concepts as outlined in point 2.1.1
- A quotation of the cost of the three elements of this project as set out in points 2.1.1, 2.1.2 and 2.1.3 **Please provide your cost proposal as per requirements on Annex B of this tender**
- Demonstration that you have taken into account all the factors listed under Requirements in proposing your approach

3.3 *Personnel Qualifications*

A list of the core staff to be assigned to this project with a brief biography for each.

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 st part of the evaluation	
1.Company Qualifications	<ul style="list-style-type: none"> - Overall experience/time in business - Experience of conducting similar projects - Experience of working in the not-for-profit sector - Experience of working in a number of different countries
2.Quality of service	<ul style="list-style-type: none"> - Comprehensiveness of submitted written proposal - Quality/ Creativity of proposed concepts and all other services offered
3.Project staff	<ul style="list-style-type: none"> - Seniority and experience of the staff assigned to the project, based on written submission

Shortlisted agencies will then 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.

2 nd part of the evaluation	
4 Quality of presentation	<ul style="list-style-type: none"> - Quality and clarity of the presentation at the WebEX; - Experience of core people who will work on the project, based on WebEX

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.

NB: Please read all annexes and instructions VERY CAREFULLY as it is essential that you follow all instructions and timings exactly in order to prevent your bid being disqualified.

Please provide your cost proposal as per requirements on Annex B of this tender

Please also note instructions for asking any questions you may have on this brief. We are very happy to provide answers.

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR will monitor the performance of the selected supplier throughout the project. Key Performance Indicators (KPIs) will be set in collaboration with the chosen agency and these will be the indicators that we will monitor together. Among KPIs, UNHCR may include the following:

- Numbers of leads generated;
- Timely delivery of concepts and creatives;
- Conversion rates from leads to donors