

**ANNEX A: TERMS OF REFERENCE
CANADA/RFP/PSP/2018/001
FOR THE PROVISION OF DIGITAL ACQUISITION SERVICES IN CANADA**

08/03/2018
Reference: CANADA/RFP/PSP/2018/001

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

Table of Contents

| | | |
|----------|---|-----------|
| 1 | Introduction | 3 |
| 1.1 | Background..... | 3 |
| 1.2 | Statement of Purpose & Objectives | 3 |
| 2 | Requirements | 5 |
| 2.1 | Core requirements | 5 |
| 2.1.1 | Account Management/Strategic Media Planning/Reporting | 5 |
| 2.1.2 | Media planning, buying, implementation and management | 5 |
| 2.1.3 | Creative development | 6 |
| 2.2 | Customer Responsibilities | 6 |
| 3 | Content of the Technical Offer | 7 |
| 3.1 | Company Qualifications..... | 7 |
| 3.1.1 | Proven track record with digital fundraising activities in the Canadian marketplace inclusive of media buying and campaign management | 7 |
| 3.1.2 | Eligibility to work in Canada | 7 |
| 3.1.3 | Experience working with similar non-profit organizations or United Nations organization is desired7 | |
| 3.1.4 | A description of your company with the following documents: company profile, registration certificate and last audit reports: | 7 |
| 3.2 | Proposed Services | 7 |
| 3.3 | Personnel Qualifications | 8 |
| 3.4 | Vendor Registration Form (Annex C) | 8 |
| 3.5 | General Conditions of Contracts (Annex D) | 8 |
| 3.6 | Special Data Protection Conditions (Annex E) | 8 |
| 3.7 | RFP Checklist Form (Annex F)..... | 8 |
| 4 | Evaluation..... | 9 |
| 4.1 | Technical Evaluation | 9 |
| 5 | Key Performance Indicators..... | 10 |
| 5.1 | Performance Evaluation | 10 |

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

1 Introduction

1.1 Background

The Private Sector Fundraising Unit in Canada is part of UNHCR Global Private Sector Partnerships Section, with a commitment to inspire awareness and approach the local community to feel part of UNHCR's mission and attract a large number of individual donations and persons committed to long-term monthly contributions.

In order to support this, UNHCR Canada is calling for proposals from qualified digital agencies to provide digital acquisition services with a specific focus on paid search, display, social media advertising, retargeting, as well as support for landing page optimization, subsequent communication support for digitally acquired donors and lead generation.

We are currently running a robust digital acquisition program through paid search campaigns, display advertising, retargeting and social network advertising. Digital is our largest acquisition channel and approximately one third of our fundraising revenue is secured from digital sources.

We are committed to the ongoing improvement our website and donation forms from a conversion standpoint – both from a creative and technical perspective - and conduct optimization tests on an ongoing basis in order to improve conversion rates. We run advocacy and engagement campaigns to secure new email and phone leads for subsequent fundraising efforts. We run several direct response campaigns a year with a substantial digital component including email marketing and social media.

Our donation forms and emails are currently on the Engaging Networks platform and our website is on Wordpress.

Please note that we are not eligible for a Google Adwords Grant account and therefore management of a grant account is not part of this proposal.

1.2 Statement of Purpose & Objectives

The contract phase is planned from August 1 2018 to July 31 2020 (two-years) and potentially extendable for a further period of one year (three year contract) subject to satisfactory performance. The successful bidder will be requested to maintain their quoted price model for the duration of the contract.

The selected vendor is required to manage and implement digital donor acquisition activities to help achieve the following objectives:

- Aug 2018-Jul 2019: To generate 7,428 new one-time donors and 1,475 new monthly donors + 8000 leads
- Aug 2019-Jul 2020: To generate 7,867 new one-time donors and 1,561 new monthly donors + 10,000 leads
- Aug 2020-Jul 2021: To generate 8,341 new one-time donors and 1,639 new monthly donors + 12,000 leads
- Meet annual digital budget targets and required ROI criteria.

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

Any adjustment on the number of target donors to be acquired shall be mutually agreed by UNHCR and the Contractor prior to the execution of the contractual service agreement and subject to revision weekly during all contract duration.

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

2 Requirements

2.1 Core requirements

2.1.1 Account Management/Strategic Media Planning/Reporting

- Provide overall account management including a dedicated account manager and team
- Design and develop a digital marketing strategy which achieves the above mentioned donor acquisition objectives
- Develop an annual media plan (with monthly iterations) which leverages a diverse set of donor acquisition strategies and channels to reach and convert new audiences
- Develop and propose creative testing plan and roll out this testing plan, including optimizing elements based on performance
- Manage all aspects of the paid media campaign
- Provide ongoing strategic advice, optimisations and media planning based on results; constantly optimize for the best possible CPA/ROI and adjust media plan accordingly
- Provide local management of UNHCR's ad accounts on Google, Bing, Facebook and other platforms as needed.
- Provide real-time or weekly campaign management reports and insights including all key media and donation metrics and overall CPA/ROI
- Provide quarterly analysis reports assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of acquisition activities in previous quarter including detailed attribution tracking
- Participate in quarterly face-to-face meetings with UNHCR staff
- Continuously optimize, make adjustments and recommendations to digital marketing program in order to achieve digital fundraising objectives donation and audience expansion targets
- Use Google Tag Manager (GTM) and Google Analytics (GA) as well as paid media tracking (such as DoubleClick bid manager) for reporting and testing

2.1.2 Media planning, buying, implementation and management

- Provide proposed account structure and manage the paid search engine marketing channel; implement and optimize this channel and ensure an overall positive ROI
- Provide creative approach and audience targeting strategies for paid social marketing and manage and optimize these channels.
- Provide strategy and methodology for bidding/negotiating with vendors to purchase space for banner advertising/programmatic display and other appropriate forms of online advertising; implement channel and achieve agreed upon CPA/ROI
- Provide media strategy for retargeting and implement retargeting activities
- Provide media strategy for native advertising and implement activities
- Provide recommendations for email list rentals, site takeovers and additional forms of digital acquisition
- Provide required number of quality leads through lead generation activities to UNHCR for donor conversion
- Provide recommendations to UNHCR to test new digital marketing strategies for donor acquisition

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

2.1.3 Creative development

- Work with UNHCR to develop key message(s)/propositions which will appeal to the target audiences and reflects UNHCR's branding and areas of work
- Develop creative display ads, using text, images, animation and video for display and retargeting within UNHCR branding
- Develop social media advertising creatives in collaboration with UNHCR.
- Develop and test landing page/donation form edits to improve returns from search and paid advertising within UNHCR's website or donation form platform
- Develop interactive landing pages for use in lead generation campaign within UNHCRs software platform, including advocacy forms, quizzes, content submissions (4 campaigns per year)
- Develop copy, design and HTML for email marketing campaigns for subsequent communications to digital donors (3 campaigns per year)

Please present your financial offer based on the above categories on Annex B. Only Annex B can be used for financial proposals. **Do not include any financial information in the technical offer.**

2.2 Customer Responsibilities

- Reconciling reports submitted by the Contractor with UNHCR database reports and letting contractor know of any required adjustment to reported figures
- Provide existing campaign assets to be adapted to local market as needed
- Provide access to UNHCR content and brand guidelines (e.g. images and data) for the elaboration of campaigns
- Allow 3rd party trackers to be included in webpages
- Share access and technical specifications for the CMS solution(s) and email platform to be used by the UNHCR

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

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*

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal):

- 3.1.1 Proven track record with digital fundraising activities in the Canadian marketplace inclusive of media buying and campaign management
- 3.1.2 Eligibility to work in Canada
- 3.1.3 Experience working with similar non-profit organizations or United Nations organization is desired
- 3.1.4 A description of your company with the following documents: company profile, registration certificate and last audit reports:
 - Year founded;
 - If a multi-location company, specify headquarters location;
 - Number of similar and successfully completed projects;
 - Number of similar projects currently underway;
 - Total number of clients, please provide a list;
 - You are requested to provide three (3) references that we may contact from your current client list, including ones from working relationships with UNHCR Canada or other UN Agencies. If submitting a partnership proposal, please provide references for each firm that is participating in the proposal bid.

Any information that will facilitate our evaluation of your company's substantive reliability, financial and managerial capacity to provide the services.

3.2 *Proposed Services*

- A description of your organization's capacity to provide the service.
- A description of your organization's experience in these services.
- All bidders should include an initial transition schedule, as well as standard delivery times for services provided.
- A few samples of successful creative pieces.
- A sample media plan
- A sample campaign management report
- A sample table of contents for a quarterly analysis report

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

3.3 Personnel Qualifications

A description of each team member's role within your firm proposed to carry out the services. Please also provide Curriculum Vitae of the core staff to work on the project.

3.4 Vendor Registration Form (Annex C)

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 General Conditions of Contracts (Annex D)

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

3.6 Special Data Protection Conditions (Annex E)

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) on the RFP Checklist Form (Annex F) and including it in your submitted Technical Proposal.

3.7 RFP Checklist Form (Annex F)

Annex F, RFP Checklist Form, has been prepared for bidders to ensure compliance with the bidding process and to double-check each step of the submission. Annex F is to be filled in, signed and sent it back with the technical proposal. Please note that acknowledgement of UNHCR General Conditions of Contract (Annex D) and UNHCR Special Data Protection Conditions (Annex E) are to be confirmed on the RFP Checklist Form (Annex F). Without acknowledgement or any information provided about the conditions, the offer will be marked incomplete and will be disqualified from further evaluation.

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

4 Evaluation

4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score (on a 100 points scale, i.e. max 70 points obtainable for the technical offer). Please find hereunder the detailed scoring breakdown:

| |
|--|
| 1. Company Qualifications (10) |
| <ul style="list-style-type: none"> General Liability of the Company (2.5) Number of similar projects, successful campaigns to acquire online sales or clients (5) Presence and experience in the non-profit sector, including experience working with NGO, UN or UNHCR (2.5) |
| 2. Quality of Service (50) |
| <ul style="list-style-type: none"> Comprehensive of presented proposal (10) Quality/creativity of services and proposals (Including third party services if applicable) media buying, media contacts (20) Capacity to provide described services in TORs and achieve the proposed result (20) |
| 3. Project staff (10) |
| <ul style="list-style-type: none"> Experience of core people who will work on UNHCR project. (Including experience with similar projects) (10) |

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.

The minimum passing scores of the evaluation is 49 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.

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **18/04/2018 23:59 EST**.

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier on a monthly basis according to the following KPIs:

- Average monthly donation
- Average one off donation
- Donors per month
- Leads per month
- ROI
- Cost per lead
- Cost per one-off donor
- Cost per recurring donor
- CTR (Click Through Rate)
- LCR (Lead Conversion Rate)
- Donor conversion rate
- Proportion of monthly donors