

Annex A: Terms of Reference  
Creative Services for Digital Materials

29 June 2018  
Reference: PSPIT0049

## Table of Contents

<b>1</b>	<b>Introduction.....</b>	<b>3</b>
1.1	Who we are.....	3
1.2	Statement of Purpose & Objectives.....	3
<b>2</b>	<b>EXECUTIVE SUMMARY .....</b>	<b>5</b>
2.1	General Background .....	5
2.2	Purpose and scope of assignment .....	8
<b>3</b>	<b>REQUIREMENTS - IMPORTANT .....</b>	<b>9</b>
3.1	Technical proposal requirements.....	9
3.2	Innovation .....	10
<b>4</b>	<b>Content of the Technical Offer .....</b>	<b>11</b>
4.1	Company Qualifications.....	11
4.2	Proposed Services .....	11
4.3	Personnel Qualifications.....	11
4.4	Vendor Registration Form .....	11
4.5	Applicable General Conditions .....	11
<b>5</b>	<b>Evaluation.....</b>	<b>12</b>
5.1	Technical Evaluation .....	12
5.2	Financial Evaluation .....	12
<b>6</b>	<b>Customer Responsibilities.....</b>	<b>13</b>
<b>7</b>	<b>Key Performance Indicators .....</b>	<b>14</b>

# 1 Introduction

## 1.1 Who we are

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the agency has helped tens of millions of people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Their staffs of more than 9,000 personnel are helping more than 55 million people in more than 123 countries. For more information, please see [www.unhcr.org](http://www.unhcr.org)

UNHCR has an ambitious Private Sector Partnership Service (PSP) program which endeavors to capitalize on the income from private-sector donors.

Fund Raising activities in Italy include two different main programs: i) the Individual Giving and Marketing (IG&M), raising money from individuals both regular and one-off, and ii) the Leadership Giving (LG) targeting companies, foundations, Small and Medium Sized Enterprises (SMEs), High Net Worth individuals and Legacy. Fundraising activities are supported by the Communication for Fundraising Team and the Support Team which directly collaborate with the other two.

IG&M Team is composed by i) Acquisition, aiming at recruiting new donors through a variety of channels including Face-to-Face, Direct Mailing, Digital and Multichannel, and ii) Donor Development, aiming at increasing donors' loyalty and value through Direct Mailing, Telemarketing (TMK), Donor care and Digital.

The main objective of the PSP Italy Digital Strategy is to increase digital income year by year, through the growth of a digital community of supporters more and more involved in UNHCR's campaigns and gradually brought to become donors.

Supporters are members of the public who interact with UNHCR (e.g. sign petitions, sign up for newsletters, follow/like on social media, donate, have donated in the past) and of which PSP Italy has at least one personal information in its database (name and email address/ telephone number/ address).

PSP Italy therefore aims at increasing the community of individual donors and supporters who engage with UNHCR through different levels of participation.

To reach the above mentioned ambitious digital goals, **PSP Italy needs high-quality Digital materials aiming at strengthening creative and concept development, by producing attention-getting contents, optimizing messages, copywriting and propositions with the final goal of improving performances.**

## 1.2 Statement of Purpose & Objectives

PSP Italy is seeking up to 3 (three) highly specialized creative Digital Agency (one primary and up to 2 back-up suppliers), able to produce and technically develop, high quality Digital creatives addressed to:

1. **Prospect and cold lists** - Potential donors/leads/potential supporters that have never donated to UNHCR;
2. **Active donors (one-off, regular and middle donors)** - donors who have done at least one donation in the past 12 months;
3. **Corporate donors** - companies, foundations, SMEs (Small and medium-sized enterprises - “Piccole e medie imprese”) and High Net Worth individuals.
4. **Lapsed donors** - donors who have done their last donation more than 12 months ago;
5. **Almost Cold:** donors who have done their last donation more than 46 months ago.

Please note that bidders should be able to provide all the required services indicated in section 2.1 and that all services should be quoted, using Annex B “Financial Offer Form”. Partial offers or partial quotes will not be considered.

PSP Italy expects the appointed Agencies to deliver the services for 2 years (January 2019 - December 2020) with possibility of 1 year extension (up to December 2021).

## **2 EXECUTIVE SUMMARY**

### **2.1 General Background**

The appointed Creative Digital Agencies will be asked to produce and technically develop different materials according to the following objectives:

1. **Acquisition of new donors** or the reaching of new supporters and leads within Acquisition/Legacy programs;
2. **Development/conversion** of donors or the reactivation of lapsed donors within the donor development program;
3. **Engagement of donors/supporters** on social media or other channels within the communication for fundraising Team.

Please note that PSP Italy may ask Agencies to create a brand new campaign (concept, graphic design, copywriting, development and deployment) and/or to adapt an existing Global campaign (graphic and copywriting adaptation) such as World Refugee Day.

The Agencies may also be required to develop digital materials starting from an existing local campaign (for which a concept development already exists) and/or creative concept.

Activities/tools that the creative Agency may be required to develop are listed below.

#### **A) CONCEPT DEVELOPMENT**

Creative concept development is the overarching Idea that captures audience interest, influences their emotional response and inspires them to take action. It is the unifying theme that can be used across all campaign messages - including the engagement mechanism, calls to action, communication channels and audiences. A successful creative concept is distinctive, memorable, unifying and relevant.

Bidders are required to quote in their financial form the cost for the development of the creative concept for a digital campaign.

**Please note that in case the Agency is required to adapt an existing Global/local Campaign, PSP Italy expects not to be charged/invoiced with the cost for concept development.**

#### **B) BANNERS AND DISPLAYS**

This form of online advertising entails embedding an advertisement into a web page with the aim of attracting potential donors to the UNHCR institutional website or a UNHCR landing page by linking it to the website of the advertiser (generally targeted online newspaper or other websites).

This represents a continuous activity over the year for PSP Italy.

Agencies will be requested to work closely with the PSP Italy focal point for Digital Acquisition and with the Media Buyer to produce multiple banners and displays in accordance with different technical features and specifics that the Media Buyer will send through, time by time, depending on the Web-sites where the campaign will be planned. Cooperation between Media Buyer and Digital Agency will maximize efforts and time.

The banner creatives might include pre-roll video formats, but new formats may be used also.

File format generally required are: html5, gif/jpg.

PSD/rough files are also required.

### **C) LANDING PAGES (one-page development)**

Appointed agencies may be asked to make changes on existing landing pages, create new ones, provide contents and materials for a consecutive in-house development, and give an on-going technical consultancy on best practices and possible attractive news/photos/materials to apply to these pages to reach the fundraising and donors' acquisitions goals.

UNHCR landing pages' goals could be:

1. **Lead generation:** to capture personal data, such as name, email address and phone number in order to connect with the prospect at a subsequent time trying to convert him/her into a donor;
2. **New donors acquisition:** the landing page includes a proper donation form to fill-in with personal data, amount of the donation and credit card information;
3. **Click-through:** landing pages to improve engagement with existing donors, lapsed donors and prospects (e.g. updates and digital actions to warm up UNHCR's donor base).

Suppliers will be also requested to develop implementation of form validation and possibly CRM synchronization for data transmission.

Moreover, Agencies may be required to implement form validation and data management for each landing page (e.g. local database or third-party services - Google Sheets, Zapier - via API's development), integration with Social Networks as well as other third-party platforms (email marketing/sms platforms, CRM and project management web applications).

They will be also requested to implement UNHCR's tracking codes on the landing page (Google Tag Manager and custom conversion tracking codes).

### **D) EMAIL TEMPLATES - DEM**

The Agency could be also required to develop multiple e-mail templates for both acquisition and retention/engagement purposes.

E-mail templates - DEM most common features and format used are listed below:

1. Responsive design;
2. Copywriting (text and subject line) or Italian translation of English materials;
3. A/B test and different creativities; the agency is expected to apply best practices for testing;
4. Spam checking and browser/email client testing.

### **E) MICRO WEB SITE (multi-pages development)**

PSP ITALY may ask suppliers to create new websites. Most common technical features for micro site are listed below:

1. CMS: WordPress. A custom setup and personalization could be asked to the Agency.
2. Database: local database (MYSQL), CRM and integration with third-party services (eg. Google Sheets, email marketing platforms and other via API's developments).
3. Development of a user-friendly interface including the support of graphics, animations and interactive tools.
4. Mobile or responsive version;
5. HTTPS management system for secure transactions;
6. Possible integration with a reserved area (if necessary/requested);
7. Conversions and tracking codes via Google Tag Manager or customized systems;
8. Social media integration (widgets, sharing tools, social development).

9. E-commerce development: e.g. an online shop to give donors and prospects the possibility to directly donate via website in view of the reception of a gadget such as digital e-card, birthday wallpaper, digital parchment, any other gadget aiming at increasing fundraising results.

Agencies will be required to:

- a) Test the website on the most used browsers for Windows, Apple, Android, IOS phone and tablets operating systems plus fixing bugs;
- b) Produce graphics of all website pages;
- c) Set up a social media integration strategy within the website;
- d) Set up a web analytics system to monitor all the web traffic information from UNHCR's different web touch points (microsites, social media, etc.) and compare them;
- e) Provide rough files (eg. PSD) if needed.

Please consider that UNHCR staff might need training for the CMS usage.

The above features are only the basics.

In case of a new websites development, the supplier and PSP Italy focal point will evaluate additional features according to the provided brief and general strategy.

- ⇒ **Please indicate in the technical offer number of resources dedicated to the activity/project.**

For the yearly estimated frequencies and number of Banners and Displays, e-mail template - DEM, Landing pages and web-sites please refer to Annex B - Financial form.

#### **F) SOCIAL MEDIA AND OTHER CREATIVITY TOOLS:**

Agencies will be asked to create social media and other creativity tools:

1. Facebook/Twitter card and Facebook/Twitter/YouTube covers;
2. E-cards, digital wallpapers, digital parchment (cf. 2.D.9);
3. Infographics.

#### **G) DIGITAL TOOLS**

In a digital market that is evolving every day, PSP Italy wants to improve its digital tools taking advantage of new online platforms.

PSP Italy may require the renewal of pro annual/monthly plans of existing online tools or the activation of new ones (e.g. unbounce.com, surveymonkey.com, slack.com).

- ➔ **Please indicate In Annex B - Financial form the fee (%) you would apply to renovate or activate these products.**

#### **H) ANY OTHER CREATIVE SERVICES**

Please note that PSP Italy may require the development of additional creative services for fundraising purposes - not listed and described in the present TORs - based on emerging needs and necessities.

Bidders are therefore required to indicate in the relevant section of the financial form the hourly cost for the development of any additional creative service that PSP Italy may need within the duration of the contract.

#### **EMERGENCY PLAN**

For the nature of its mission UNHCR faces natural and man-made emergencies for which fundraising efforts are requested. In case a humanitarian emergency occurs, involving UNHCR, an emergency alert will be formally communicated to the supplier focal point by phone or e-mail; regardless of the day of the week (communication may happen on weekends).

To guarantee a quick response to every emergency, the supplier will be requested to:

1. Develop the Digital Acquisition Emergency Pack (banner set, DEM, landing page)
2. Develop Digital Donor Development tools (...)
3. Develop social media creative tools

When an Emergency arises, the timely implementation of activities is crucial and a priority for fundraising activities.

For this reason, PSP Italy requires from all its suppliers a prompt reaction.

**If required, please note that PSP Italy may request the Agency to purchase good and attention-getting photo from specialized agencies.**

---

## ***2.2 Purpose and scope of assignment***

---

In summary, the proposal for digital services is required by PSP Italy for the period January 2019 - December 2020 (with possibility of 1 year extension up to December 2021).

Services, PSP Italy expects the appointed Agencies to deliver, are the following:

1. Production of high quality and high specialized creative Digital tools (by creating a new campaign or adapting existing campaigns) able to stimulate different targets and to reach the ambitious objectives of:
  - a) Acquire new donors/reach new supporters;
  - b) Develop/convert donors or reactivate lapsed ones;
  - c) Engage donors/supporters on social media.
2. Technically develop the tools produced;
3. Support PSP Italy during Emergency situations by producing, in a very short time, an Emergency pack and, by doing so, helping the Organization being the first one to reach the target and maximize fundraising.

Please note that the main purpose of the creative tools is to stimulate the raise of funds to boost donations for the Organization. For this reason, it is important that creative materials are developed from a Fundraising point of view using the most common and innovative fundraising techniques.

Please note that PSP Italy can adjust figures during the period and that the scenario can change on the basis of UNHCR needs and budget availability.

Please note that PSP Italy expects prices to remain constant over the period of the Frame Agreement (2+1 years) even if quantities ordered during the year will be less than those indicated in the financial form.



### 3 REQUIREMENTS - IMPORTANT

#### 3.1 *Technical proposal requirements*

For the technical evaluation, bidders are kindly required to:

1. Develop a complete creative digital campaign (concept development, graphic design and copywriting) based on Winterization campaign (Christmas campaign) and develop a mock-up for the above listed digital products:
  - 1 landing page (one-page) with the aim at acquiring new donors
  - 2 banners (728x90, 320x240)
  - 1 DEM targeted to existing donors
  - 1 Facebook cover
  - 1 Twitter cover
  - 1 sharing card
  - Advices on actions to do in order to improve results and reach goals.

All campaign's materials should be in Italian.

Campaign's pay-off should be immediate, straight, and meaningful. Use of images should be emotional, involving, touching. Copywriting should be based on an effective use of a "donor-centric" storytelling, while focused on the urgency of the situation.

Creativity in its complex should excite the potential donor and bring him/her to donate for the emergency.

2. Provide ANNEX C - Timing duly filled-in, by indicating the time required for the delivery of each creative tool from the reception of the brief sent by PSP Italy.
3. Provide a detailed description of how your company intends to manage the services in standard situation - from production to technical development, pointing out timing necessary to deliver each different material (from the reception of the brief sent by PSP Italy). Please also fill-in ANNEX C - Timing.
4. Following the information indicated in the EMERGENCY PLAN section, please provide a detailed description of how your company intend to manage services in Emergency situations and submit an Emergency plan describing:
  - a) How you would support PSP Italy to cope with the emergency;
  - b) Personal data of the Focal point (to be contacted during holidays too);
  - c) List of activities/action to do before the emergency begins;
  - d) List of activities/action PSP Italy should do;
  - e) List of activities/action that will be implemented by the Supplier;
  - f) Fill in ANNEX C - Timing.
5. Provide examples/best cases of past Digital campaigns followed, pointing out objectives reached. A digital fundraising portfolio is considered an asset. Please provide also a list of technologies (wireframes, CMS, scripting codes, etc....) adopted by the Agency to develop the projects.

Please find below some useful links where to find information in order to develop your proposal:

- ✓ International website: <http://www.unhcr.org> and <http://www.unhcr.org/stories.html>

- ✓ Italian website: <http://www.unhcr.it>
- ✓ UNHCR's photo repository: <http://media.unhcr.org>
- ✓ Shared folder with winterization campaign materials, UNHCR's brand book and logos: <http://bit.ly/unhcr-winterization>

---

### ***3.2 Innovation***

---

This special section is dedicated to the innovative suggestions presented by the supplier as new approaches, new products, new communication methods, new working procedures, activity follow-up, tests for standard and emergencies activities to be suggested and proposed, anything the vendor deem important to highlight, present or propose.

## 4 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:

### 4.1 Company Qualifications

- Company profile and company registration certificate (Iscrizione al registro delle imprese);
- Year founded;
- Office presence in Italy (if multi location company, specify headquarters location);
- Number and description of similar and successfully completed projects and/ or currently underway;
- Balance sheet and/or Last Audit Report;
- Self-certification that contracts are in line with the Italian law;
- “Documento unico di regolarità contributiva” (DURC);
- List of main clients;
- At least 3 relevant references;
- Any information that will facilitate our evaluation of your company’s substantive reliability, financial and managerial capacity to provide the services.

Please note that experience in the no profit sector is deemed an important technical criteria.

### 4.2 Proposed Services

- Please provide all the information required listed in 3.1 Technical Proposal Requirements (from 1. to 5.).
- Please provide Annex C - Timing

### 4.3 Personnel Qualifications

Please provide Curriculum Vitae of core staff you propose to carry out the project (max 5 CVs of max 3 pages each).

### 4.4 Vendor Registration Form

If your company is not already registered with UNHCR, you should complete, sign and submit with your technical proposal the Vendor Registration Form (Annex D).

### 4.5 Applicable General Conditions

Your technical offer should contain your acknowledgement of the UNHCR General Conditions for Provision of Services by signing Annex E.

**Important:** Please note that proposals should be prepared in English (or in English and Italian). Company’s qualifications are accepted in Italian, while creatives/campaigns materials should be in Italian.

For any additional information concerning further documentation to submit, offers evaluation, timing and modality to participate to the present tendering process please refer to the RFP document.

Please refer to Annex F for the check list before submitting all documentations.

## 5 Evaluation

### 5.1 Technical Evaluation

The Technical offer will be evaluated using the following criteria and percentage distribution: 70% (i.e. 70 points) from the total score of 100 points.

CRITERIA DESCRIPTION	Weight
<b>1. Company Qualifications</b>	<b>25%</b>
General Liability / Capacity of the Company	
Overall fundraising experience/time in business - Experience of developing creative digital tools working with not for profit/UN/UNHCR sector/environment	
Experience of completing similar projects (or currently in progress) internationally/Italy (produce and technically develop digital creative tools) and Digital fundraising portfolio	
<b>2. Quality of Service</b>	<b>40%</b>
Comprehensiveness of the overall proposal	
Innovation, creativity, quality and effectiveness of proposed services (concept development, graphic design and copywriting)	
Management ability to support UNHCR in standard and emergency situation	
Quality and relevance of examples/best cases of past Digital campaigns followed	
Technical skills for tools production and development	
Speed and efficiency in producing creative tools in standard and emergency situations (based on submission and on Annex C)	
<b>3. Project staff</b>	<b>5%</b>
Experience of core people who will work on the project	
<b>TOTAL TECHNICAL SCORE</b>	<b>70%</b>

Bidders must have a minimum technical threshold of 49 out of 70 points for the technical proposal in order to be considered further in the financial evaluation process.

### 5.2 Financial Evaluation

The financial component is 30% of the total score. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price.

## **6 Customer Responsibilities**

PSP Italy will be responsible for:

- Appointing a dedicated project manager for each project;
- Providing all material and reference within agreed timelines and according to required specifications.
- Providing support and all needed guidance in order to ensure smooth and timely communication between the supplier and offices participating in the project.
- Providing logos and materials;
- Providing input on images/copywriting and materials used by the vendor.

## **7 Key Performance Indicators**

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis based on the following KPIs:

- Deadlines met within agreed timing;
- Quality of developed products according to given creative brief and UNHCR brand book;
- Support during the product development phase;
- Secure a smooth interaction with media agency for products delivery.