UNHCR
The UN Refugee Agency

Annex A: Terms of Reference
E-mail Marketing Platform

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Table of Contents

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

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

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.

1.2 Objectives and Purpose of assignment

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 who engage with UNHCR through different levels of participation.

In order to contribute in reaching the above mentioned digital goals, PSP Italy is now looking for a high-quality E-mail Marketing Platform provider, with possibility of a backup supplier, to deliver the service for 2 years (January 2019 – December 2020) with possibility of 1 year extension (up to December 2021).

2 EXECUTIVE SUMMARY

2.1 Standard Features/functionalities

The appointed supplier will be asked to provide PSP Italy with an E-Mail Marketing Platform with, at least, features/functionalities described below.

A) CONTACTS MANAGEMENT

A good contacts management has become crucial to success in fundraising.
Basically, for contact management, PSP Italy intends the possibility of:

1. Uploading data from different files;
2. Scheduling the import of contacts from an external DataBase;
3. Managing and personalizing rules for the insertion of contacts in greylists and blacklists.

B) SEGMENTATION

In order to have the opportunity to segment the donors' base into groups of individuals that are similar for relevant variables, such as age, gender, interests, donation value, etc… the E-mail Marketing Platform should guarantee the:

1. Creation of Static Groups of contacts;
2. Creation of dynamics filters or group of contacts.

C) DELIVERY

Important features pertaining to delivery are:

1. Limited time for the delivery of an e-mail to 100,000 contacts;
2. Possibility to send communications through multiple channels other than e-mails (such as SMS, etc…);
3. Number of A/B test that can be set for each delivery;
4. Number of different variables such as Open-rate, Click–rate, Conversion – rate on which A/B tests can be based;
5. Possibility to set recurring deliveries;
6. Presence of the SMTP service for the delivery of transactional e-mails from external systems.

D) CONTENT CREATION

It is essential that a good E-mail Marketing Platform guarantees the possibility to:

1. Develop dynamic contents;
2. Personalize contents;
3. Personalize e-mails based on a pre-uploaded form;
4. Develop landing pages;
5. Develop and delivery surveys;
6. Develop e-mails through an advance editor.

E) AUTOMATION/WORKFLOW

The presence of a marketing automation solution – a software that enables to automatize some fundraising processes and some recurring activities – is crucial.

F) REPORT

The platform should ensure at least:

1. The automatic export of deliveries and performances on client CRM;
2. A tracking code for the monitoring of conversations.

G) APPLICATIONS AND INTEGRATIONS Please refer to Annex C Technical Requirements for further details.

H) A RELIABLE PLATFORM UPTIME (indicating the time during which the platform is operational).

I) THE HELP DESK (a place that a user of information technology can call to get help with a problem).

Further details on the above requirements are indicated in the Annex C – Technical Requirements.

2.2 Purpose and scope of assignment

In summary the appointed supplier will deliver the services for 2 years (January 2019 – December 2020) with possibility of 1 year extension (up to December 2021).

Services that PSP Italy expects the appointed Agency/ies to deliver during the contract period, are the following:

1. Provision of a high-quality E-mail Marketing Platform with at least features/functionalities highlighted above.

2. Development of potential additional tools such as marketing automation, Webservices, etc.… and technical developments such as New E-mail templates, etc.…

3. Provide consultancy and provide both strategic and operational support with a proactive and problem solving approach.

4. Support and assist PSP Italy during the contract period with trainings if necessary.

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. Duly fill-in and answer to questions of **Annex C Technical requirements.**
   Please note that there are two columns PSP Italy requires to fill-in:
   - Column E - ANSWER → Suppliers are required to use this column to answer requirements of column D;
   - Column F - ADDITIONAL INFORMATION/NOTES => if the feature is not already existing as part of the E-mail Marketing Platform, suppliers are requested to explain if there would be (or not) the possibility to develop it and if so, in how much time. Suppliers can also use the column in order to give additional information deemed relevant.

2. Provide the E-mail Marketing Platform user guide;

3. Provide the Webservice API document if available;

4. Provide a description of how your firm would give support to the development of the E-mail Marketing Programme;

5. Provide a portfolio of similar developed projects.

3.2 Innovation

This special section is dedicated to the innovative suggestions presented by the supplier as new approaches, new tools, new apps, tests and anything the vendor deems 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);
- Balance sheet and/or Last Audit Report;
- Self-certification that contracts are in line with the Italian law;
- "Documento unico di regolarità contributiva" (DURC) if applicable, or self-certification that taxes and pension provisions are regularly covered by the company;
- List of main clients with contact details;
- At least 3 relevant references with contact details;
- 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.) including **Annex C Technical requirements**

4.3 Personnel Qualifications

Please provide Curriculum Vitae of core staff you propose.

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), while Company's qualifications are accepted 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
1. Company Qualifications	**10%**
General Liability / Capacity of the Company	
Overall fundraising experience/time in business	
2. Quality of Service	**50%**
Comprehensiveness of proposal	
Experience of similar projects followed internationally/Italy	
Support to the development of the E-mail Marketing Programme	
Quality of Platforms and related service	
3. Project staff	**10%**
Experience of core people who will work on the project	
TOTAL TECHNICAL SCORE	70%

Bidders must have a minimum technical threshold of 42 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;

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 based on provided guidelines and specifications.
- Support during the product development phase;
- Secure a smooth interaction with third parties for products delivery.