ANNEX A: TERMS OF REFERENCE
RFP/2019/013

FOR THE ESTABLISHMENT OF FRAME AGREEMENT
FOR THE PROVISION OF GLOBAL MEDIA BUYING SERVICES

UNHCR
The UN Refugee Agency

Table of Contents

1 Introduction 3
1.1 Background 3
1.2 Statement of Purpose & Objectives 4

2 Requirements 5
2.1 Core requirements 5
2.1.1 Account Management HQ 6
2.1.2 Media Planning and Buying/Account Management/Reporting REGIONAL OFFICES 6
2.1.3 Creative Services 7
2.2 Customer Responsibilities 8

3 Content of the Technical Offer 9
3.1 Company Qualifications 9
3.2 Proposed Services 9
3.3 Personnel Qualifications 10
3.4 Vendor Registration Form (Annex C) 10
3.5 General Conditions of Contracts (Annex D) 10
3.6 Special Data Protection Conditions (Annex E) 10

4 Evaluation 11
4.1 Technical Evaluation 11
4.2 Financial Evaluation 12

5 Key Performance Indicators 13
5.1 Performance Evaluation 13

Introduction

1.1 Background

Every year, millions of men, women and children are forced to flee their homes to escape conflict and persecution. UNHCR aims to protect them, saving lives, focusing on their basic needs and rights and helping them build a better future.

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. Its staff of more than 9,000 personnel is helping more than 65 million people in 125 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see http://www.unhcr.org

In the last 10 years, UNHCR has grown its private sector income from USD 34 million in 2007 to USD 423 million in 2018. This represents 10 percent of the total income and has been achieved through the financial support of two million individuals, most of whom give regular donations; and of companies, foundations and philanthropists partnering with UNHCR to deliver critical programmes and raise awareness of the refugee cause.

UNHCR has private sector fundraising programmes in 30 regions/countries, including UK, Italy, South Korea, Hong Kong SAR, Canada, Mexico, Brazil, Denmark, Belgium, France, the Netherlands, Switzerland, MENA, Africa, Argentina, China, Malaysia, Thailand, Philippines. UNHCR will be exploring and expanding to new fundraising markets over the coming years to ensure long-term growth.

UNHCR also has partnerships with independent charitable organizations known as National Partners. National Partners raise funds for UNHCR and awareness of the refugee cause. The use the UNHCR brand for fundraising purposes and engage directly with donors. UNHCR National Partners operate in: Australia, US, Spain, Argentina, Japan, Sweden, and Germany.

The purpose of the Private Sector Partnerships Service (PSP) is **to maximise UNHCR's engagement with the private sector in order to mobilise support and resources for the refugee cause**.

By 2025, our ambition is to engage with 25 million supporters globally and **to raise USD 1 billion in financial contributions from the private sector each year by 2025**.

Digital Transformation is named as one of the four *drivers of growth* which will be critical in enabling us to reach this level of ambition.

Given the unrelenting need for its vital support to refugees, UNHCR is firstly seeking a global; multi-channel media-buying agency to continue to create and manage media advertising campaigns on its behalf, in order to ensure increased awareness, engagement and support of its work across the world.

This project has been initiated by the Digital Engagement Section (DES) which is part of Private Sector Partnerships Service (PSP) to ensure that UNHCR has a frame agreement in place with a full service digital

and multi-channel agency, who will enable the organisation to increase its engagement and financial support through predominately digital channels.

1.2 Statement of Purpose & Objectives

UNHCR are aiming to boost the digital presence of UNHCR globally to deliver long-term sustainable solutions that provide security, dignity and a future for refugees. With our strategy of 'Digital Transformation' we will look first for digital opportunities in everything we do, locally and globally. Our global investment will priortise rapid expansion of digital supporter engagement.

PSP has an ambitious five-year engagement and fundraising strategy that endeavors to capitalize on support and funds from the public and private sectors through a variety of channels. It is recognized that multi-channel paid media campaigns, predominantly on digital channels are fundamental to further building awareness, engagement and support for UNHCR's cause, and achieving our strategic engagement goals over the next five years.

In order to progress in multi-channel integration UNHCR is seeking firstly to contract with a global digital media buying and creative agency to help manage integrated acquisition campaigns to better assimilate all media channels, including both supporter engagement and fundraising campaigns. Also to provide best of class digital and offline creative services, strategic support, creative content and communications focusing on supporter experience, performance and data.

It is essential that any multi-channel media buying agency that responds to this tender is able to demonstrate their core digital competency. In line with external global audience media consumption trends, the digitalization of offline channels, and the 'digital transformation' component of PSP's engagement strategy, and key objective of the RFP is that the majority of UNHCR's paid advertising campaigns over the next five years will run on digital channels. A digital first agency is a fundamental requirement for any agency that wishes to respond to this RFP.

UNHCR will be engaging the selected agency/s to lead on regional/country paid media campaigns, including donor acquisition, lead generation, supporter engagement, advocacy campaigns, digital asset creation, and brand engagement. The selected agency will be required to have a global presence with regional/country offices and teams available to work with UNHCR's network of PSP regional/country fundraising offices.

The selected agency(ies) should be able to provide account management services from a single HQ location to develop, oversee and onboard all regional offices ensuring agreed processes, KPI's, and standard operating procedures are adhered to, and to offer ongoing global insights and strategic services. Regional/country offices will work directly with regional/country UNHCR PSP offices for direct services, creative services, digital asset design, and media buying activities.

UNHCR Private Sector Partnerships (PSP) is seeking to enter into a Frame Agreement (FA) with an external service provider(s) for the maximum period of thirty-six (36) months with the possibility of two (2) times twelve (12) months extensions, subject to satisfactory performance. The core services that UNHCR requires as a result of this RFP are outlined in section 3, 'Core Requirements'.

Service provider(s) will be requested to keep the proposed fees unchanged for the duration of the Frame Agreement.

Requirements

Mandatory

Bidders are requested to provide the information below as a mandatory requirement:

- Ability to manage media buying services in the following regions/countries: France, Belgium, China, Malaysia, Hong Kong SAR, South Korea, Australia, India, Singapore, Denmark, Philippines, Africa
- Business has been operational for more than three (3) years
- Copy of Certificate of Registration or Certificate of Incorporation
- Copies of latest audited accounts or financial statements
- Three (3) client references

2.1 Core requirements

It is essential that any multi-channel media buying agency that responds to this tender is able to demonstrate their core digital competency in the following:

1. A global/regional reach with a central account management structure.
2. Full service integrated acquisition and digital media buying capacity
3. Full service digital creative, content and development services

2.1.1 <u>Account Management for HQ office of the awarded company</u>

One off

- Develop global processes, planning and briefing documents for global and regional teams
- Develop key standardized templates including media briefs, media plans, strategies, to include all standard digital reporting metrics, dashboards and KPI's as agreed with UNHCR HQ team.
- Conduct full on-boarding of regional agencies on UNHCR procedures, expectations, financial processes, planning, and reporting.

Ongoing

- Ensure regional teams adhere to global standards for ad trafficking, ad serving and UNHCR UTM naming conventions.
- Quarterly/Annual global reviews with recommendations to improve performance across channels
- Oversight over regional agency team financial billing and ensuring it is consistent with global contractual Frame Agreement
- Oversight on quality of media buying and best practice across regional agency teams
- Sharing best practice and learnings across regional agency teams
- Setting up Emergency Protocols to ensure quick to market response and producing keyword and ad copy centrally when required.
- Act as an escalation point for any difficulties arising from regional agencies and teams.

As required

- Deliver global campaign strategy, content plans and creative assets for UNHCR global campaigns/events
- To support UNHCR with social engagement and influencer strategies and advise on new and emerging social media platforms and best strategy for entry onto these platforms.
- To advise on how best to monitor, report on and optimise social media marketing and engagement activities internally.
- To support UNHCR with negotiating innovation strategies and partnerships including exclusive advertising deals with partners and media marketing suppliers such as Facebook, Google, YouTube, Instagram and Twitter.
- To produce documentation, user guides and provide training when required.
- To provide other strategic services including audience research, Emergency Response strategy, non-acquisition, brand awareness and digital marketing data.
  To provide advice on the best attribution model to be implemented globally, to maximise the digital media buying impact.

2.1.2 <u>Media Planning and Buying/Account Management/ Reporting for the REGIONAL OFFICES of the awarded company</u>

Regional PSP teams/offices will be the main point of contact for agen(cies) local account service teams.

- Provide overall regional/local account management including a dedicated account manager and team.
- Deliver regional/country campaign strategy, content plans and creative assets for UNHCR regional campaigns/events.
- To support UNHCR regional/country teams with social engagement strategies and advice on new and emerging social media platforms and best strategy for entry onto these platforms.
- Design, develop and execute digital marketing strategies which achieve regional/local UNHCR acquisition and retention objectives with an emphasis on acquiring regular givers. To include, paid search engine advertising, social media advertising, online display, programmatic, re-targeting, real-time bidding, mobile and in-application advertising, digital video advertising, affiliate marketing, permission based eDM, content marketing and native advertising, online sponsorship marketing and other suitable forms of paid and pro-bono advertising for the purposes of awareness building, brand building, supporter growth, lead generation and supporter conversion.
- Develop and execute strategy and media plans which leverage a diverse set of donor acquisition strategies and channels to reach and convert new audiences.
- Develop and execute creative testing plan and roll out this testing plan, including optimizing elements based on performance. To include automated multi-variant testing, creative 'theme' testing, audience and target testing, and context and media testing.
- Provide best paid keywords for top performing key words, ad copies and A/B tests using experiments and drafts function or other technology as required.
- Support UNHCR to implement the latest search trends i.e. Voice Search, Image Search, and Facebook Search etc.
- Manage all aspects of paid media campaigns including building awareness to assist conversion.
- Provide ongoing strategic advice, optimisations and media planning based on results; constantly optimize for the best possible CPA/ROI and adjust media plan and media buying accordingly.

- Provide management of UNHCR's ad accounts on Google, Bing, Facebook, Instagram, YouTube, programmatic, mobile and in-app, digital video, display, content and native, and other ad platforms as needed.
- Provide strategic advice and support with social influencer's partnerships and management.
- Align and support with UNHCR attribution requirements and supporter engagement journey through Omni-channel.
- Provide reports and insights including all key media and donation metrics and overall CPA/ROI.
- Continuously optimize, make adjustments and recommendations to marketing programs in order to achieve fundraising objectives, donation, brand, supporter, 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. Use UNHCR UTM naming conventions for all ads and marketing campaigns.
- Link ad platforms to UNHCR Data Lake through connectors or API's to enable UNHCR to use data for further analysis.
- Set up and push tracking tags for Ad platforms to all relevant landing and conversion webpages via UNHCR's Google Tag Manager (GTM) account for UNHCR staff to approve and publish.
- Document all Ad trackers implemented on UNHCR web properties with purpose, data being collected, 3rd party data processors involved, and types of processing, data storage locations and data retention policies.
- Provide best-practice reporting and analysis on both multi-channel and single channel media performance.
- To produce documentation, user guides and provide training when required.
- 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 acquisition.
- Fundraising DRTV media buying (where applicable) Non mandatory.
- Offline marketing including outdoors, print, and radio (where applicable).
- 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.
- Other suitable forms of paid and pro-bono advertising for the purposes of awareness building, brand building, supporter growth, lead generation, and financial conversions.
- To provide other strategic services including audience research and digital marketing data.

2.1.3 Creative services for the REGIONAL and HQ offices of the awarded company

- 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 concepts and creative strategies for digital campaigns, products and fundraising activities
- Support UNHCR to localize UNHCR global campaign content, projects and fundraising activities for use in respective regional market.
- Develop creative display ads (HTML5), using text, images, animation and video for display, native and retargeting within UNHCR branding guidelines.
- Production of ad copy, key words and ad extensions for SEM campaigns.
- Develop social media advertising creatives in collaboration with UNHCR.
- Production and build of digital assets and products.
- Provide expert guidance on best practice for the development of digital assets and products.
- Creative copywriting support.
- User Experience and User Interface design support.
- Outdoor display advertising creative.
- Print design.

Please present your financial offer based on the above categories in 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

- Providing media briefs and submitting budgets
- Provide landing page and e-commerce environment, and tracking requirements
- Approve all media assets, keywords, and ad copy
- Provide access to Google Analytics for reporting and audience planning
- Reconciling reports submitted by the Agency 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

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):

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 and the regional/country offices that will be involved in the project work with founding dates:
- Countries where your company will be able to provide services (list the countries and languages where your company will be able to pride the requested services)
- 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. 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.

Please ensure to provide all necessary documents requested above to establish compliance with the criteria.

3.2 Proposed Services

Proposed Service as part of the technical evaluation, in this section, the panel will score (1) the comprehensiveness of the proposals; (2) your company's compliance regarding the required services listed under 2.1 Core Requirements, demonstration through projects underway and successfully completed; and (3) Capacity to provide described services listed under 2.1 Core Requirements.

- The sponsors for this project are based in Copenhagen, Denmark and Bangkok, Thailand for HQ Account Management. Agency(ies) will need to provide regional/local account service teams in the regions where UNHCR runs its engagement and fundraising activities. Regional/country UNHCR teams currently using global media buying services are as follows: France, Belgium, China, Malaysia, Hong Kong SAR, South Korea, Australia, India, Singapore, Denmark, Philippines, Africa. However, other UNHCR fundraising markets within the UNHCR network may also choose to use the awarded agency.

- A proven track record in delivering innovative and up to date, paid media campaign solutions with a predominant focus on digital channels and social media.

- Relevant experience working with international companies, non-profit agencies or United Nations organizations preferred.

- Account service teams with experience working with large international organizations and regional teams

- All bidders should include an initial transition schedule, as well as standard delivery times for services provided. The transition should include all the preparatory activities required prior to starting to use the awarded company's services: e.g. setting up AdWords accounts, on boarding, setting up new processes, etc.

3.3 Personnel Qualifications

- A description of your organization's capacity to provide the service both from an HQ Account Management and Regional/local agency capacity.

- A description of each team member's role within your organization both for HQ and regional teams 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, stamp and submit with your Technical Proposal the Vendor Registration Form (Annex C) with the supporting documents as indicated below:

- Copy of Certificate of Registration or Certificate of Incorporation
- Copies of audited accounts or Financial Statements for the past three years
- Bank statement or letter of confirmation from the bank or any other official document demonstrating ownership of the bank account declared

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) and include the signed copy 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) and include the signed copy in your submitted Technical Evaluation Proposal.

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 (20)
• Global reach, regional presence, list regional/country markets covered.
• Experience of similar and successfully completed projects (please include three (3) client references. • Overall relevant experience working with international/regional nonprofit or United Nations Organizations.
2. Quality of Service (40)
<u>Comprehensiveness of written proposal</u> The quality/creativity of the proposed services to achieve UNHCR objectives as outlined in 2.1 Core Requirements including third party services if applicable), to include examples of; • Best practice sample online media plan • Outline of media buying services • Example of a campaign management report • Example of sample contents for a quarterly and monthly analysis report • Analysis and optimization: examples of reports and recommendations for optimization • Strategic ability and planning: campaign case study demonstrating both strategic insights which led to a tactical plan for online acquisition and strategic communication projects • Cross channel integration: example of mulita channel campaign using digital to drive acquisition and/or lead generation • Examples of creative assets: SEM, Display, Social Media, Native, offline • Example of a concept/creative strategy for a digital product/campaign
3. Project staff (10)
• Experience of core people who will work on project/s with UNHCR both from HQ and regional teams. • Strategy development; Media buying/Social media/Engagement/Partnership/Campaign/Emergency/Brand • Creative Services

Pre-qualified agencies will be asked to deliver a presentation on their proposal and to introduce the team members who would work with UNHCR in case the agency is awarded via web/teleconference.

The minimum passing scores 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.

4.2 Financial Evaluation

The financial offer will count for 30% of the total evaluation criteria.

Please present your financial offer using only Annex B. You can add breakdown and further information on a separate sheet of Annex B.

Travel: If in the purchase order 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.

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; e.g., [total Price Component] x [USD lowest] / [USD other] = points for other supplier's Price Component.

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:

- Delivery of commissioned work on schedule
- Quality of product and service
- Satisfaction of service level agreements
- Quick to market launch of emergency appeals/campaigns
- Performance ROI for media buying campaigns. ROI to include full costs not only media buying campaign costs.
- Satisfaction of regional teams with local agencies performance