



Annex A: Terms of Reference
2020-RFP-008
Request for Proposal for
Establishment of frame agreement
for the provision of global creative individual giving (IG) marketing services

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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 134 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 where they can 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 70.8 million people are today forcibly displaced, of which 25.9 million are refugees who have been forced to flee across international borders, and the rest are people displaced within their own countries.

Private sector partnerships (PSP):

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In 2020, UNHCR needs USD 8.67 billion for its global work. This amount is set to grow with current conflicts fuelling displacement.

UNHCR has had one of the fastest growing international private sector fundraising programme in the world and currently has the ambitious target of raising US\$1 billion from 5 million supporters.

In 2018 private sector partnerships contributed 11% to the overall budget of the organization with the rest coming from governments. UNHCR has private sector fundraising programmes in 27 countries, including the UK, Italy, South Korea, Hong Kong, Canada, Mexico and Brazil.

In eight 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: Argentina (Argentina for UNHCR), Australia (Australia for UNHCR), Germany (UNO Flüchtlingshilfe), Japan (Japan for UNHCR), Spain (España con Acnur), Sweden (Sweden for UNHCR), the UK (UK for UNHCR), the USA (USA for UNHCR) and Switzerland for UNHCR.

Individual Giving

Individual giving is defined as voluntary income given by individual members of the public up to a cumulative value of \$10,000 in a year. Individual Giving accounts for approx. 70% of PSP's total income raised annually equating to approximately \$346 million in 2019.

PSP has achieved rapid growth since 2008 recruiting donors primarily via face-to-face (on the street canvassing), though in recent years greater emphasis has been placed on recruiting donors through digital channels and DRTV. Approximately two thirds of donors globally are recruited directly on to monthly/sustained giving and by the end of 2019 there were 2.4 million active (donated in last 12 months) donors globally.

With such a large donor base in place there is a requirement to improve donor retention and increase average value per donor through donor development. In recent years fundraising agencies have been used by the International Individual Giving team and the International Campaigns team at a global level to support Individual Giving activity.

Examples of some Individual Giving fundraising services recently provided through agencies:

1. Development of a first-year retention program

Anything up to 50% of newly acquired monthly donors can attrite in the first year, depending on the market. PSP worked with a fundraising/direct marketing agency to develop a first-year retention program aimed at improving retention on average by 5%. The program has been developed utilising both online and offline elements and is being tested in several markets.

2. Creation of best practice guidance for middle donors

The middle donor income stream, those that give between \$1,000 and \$10,000 per annum, has been identified by PSP as a priority to increase long term individual giving income and to act as a feeder pool to the major donor program.

PSP worked with a fundraising /direct marketing agency to develop best practice guidance for setting up and implementing a middle donor program, which markets can adapt to local needs. This guidance was supplied with suggested communication plans and templates. The guidelines were developed in collaboration with 3 markets (Australia, the US, and the MENA region) and implementation supported with workshops.

3. Development of legacy marketing best practice guidance and marketing assets

Legacy marketing is an under-developed income stream for UNHCR. To help support and encourage markets to invest in legacy marketing, best practice guidance and marketing assets were developed aimed at an Individual Giving audience. This was undertaken in collaboration with the Australian, Canadian and Swedish offices.

4. 1 Billion Miles to Safety - Step With Refugees

In 2018 a creative agency was used to develop the concept, name and visual identity for PSP's first lead generation campaign (<https://stepwithrefugees.org/en/>). This agency was then used to develop the accompanying lead generation assets for

markets to adapt for local use. These assets included a campaign website (including a service level agreement which covers hosting, monitoring and support to markets), promo video, digital and social media assets, and email appeals. In 2020 the same creative agency was used to develop a promo video for a Peer to Peer Campaign for Step With Refugees.

1.2 Statement of Purpose & Objectives

UNHCR is seeking to enter into a Frame Agreement contract with one service provider that specializes in fundraising/direct marketing services to support individual giving fundraising.

The Frame Agreement will be signed with the successful bidder for three (3) years, with the possibility of two times twelve (12) months extensions, subject to satisfactory performance.

The service provider is expected to:

- Bring significant knowledge and a proven track record of developing successful and transformative fundraising creative, campaigns and products.
- Understand the parameters when creating fundraising creative, campaigns and products across several markets: adaptability, language, culture etc.

2 Requirements

2.1 Project development

The following outlines the types of projects that may be required by agencies selected:

- development of fundraising products, for example a high value regular giving/sustainer product;
- development of multi-year global campaigns;
- development of projects and programs to support donor acquisition, retention and development.
- development of donor acquisition campaigns through multiple channels: press, cold direct mail, digital etc. for one or more offices;
- development of donor appeals and stewardship materials via direct mail and email for one or more offices;
- development of advocacy campaigns to recruit supporters and engage existing donors.

The following outlines the types of agency services that may be required. Note, for any project one or more services may be required using one or more channels e.g. direct mail, online, video etc.

2.2 Individual Giving campaign strategic support

To provide strategic advice to support the development of campaigns and products that may be focused on either/both fundraising and awareness. This may include best practice guidance.

2.3 Concept and creative development

To develop industry leading, stand out creative from concepts through to finished artwork and may encompass several assets, both digital and non-digital. These should be developed to a level that they can then be adapted and tailored by the markets.

2.4 Rapid prototypes

Capacity to develop creative rapid prototypes for new concepts for products and assets that can be tested and tweaked. This can range from a pseudo app, to pseudo landing page, telephone script, etc. These prototypes may include deviations for testing purposes.

2.5 Scenario

It is anticipated that there will be two (2) to three (3) global campaigns per year and they will primarily be developed in English. Please note that figures have been stated in order to enable bidders to have an indication of the projected requirements. It does not represent a commitment that UNHCR will purchase a minimum quantity of services. Quantities may vary and will depend on the actual requirements and funds available regulated by issuance of individual Purchase Orders against the Frame Agreement.

3 Customer Responsibilities

UNHCR is responsible for providing the following:

- 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.
- Meeting deadlines for approvals set in collaboration with the agency, providing timely feedback and dedication to a collaborative and creative approach to project delivery.

4 Content of your technical proposal

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information.

Your proposal is to be sent in English. Please note that NO financial details can be included into the technical proposal. Failure to comply with this requirement will result in disqualification.

4.1 Company Qualifications

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal). During the technical evaluation, in this section, the panel will assess your company qualification and experience in the relevant sector. Please provide:

- A description of your company with evidence of your company's capacity to perform the services required, including:
 - Year founded,
 - Company profile,
- If multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates;
- Last balance sheet, last year audit reports or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company's financial soundness and stability;
- Company certificate / certificate of incorporation to prove legal existence
- Total number of years in the individual giving fundraising sector;
- Total number of clients in the non-profit (i.e. charity) sector; please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.
- Delivery of industry leading fundraising creative, products and campaigns in the last 5 years. Please provide a minimum of three case studies representing the types of campaigns/projects outlined in Requirements, section 2.1.
- Number of similar projects currently underway;
- A list of current clients, and the locations served for each;

4.2 Proposed Services

During the technical evaluation, in this section, the panel will assess (1) *the comprehensiveness of the proposal* and (2) *your company's compliance regarding the required services listed under section* and (3) *the number of similar projects successfully completed and currently on-going*:

- Clear demonstration of capacity and capability to deliver services as outlined under Section 2
- Outline your company's approach to delivering best in class agency/client service.

4.3 Personnel Qualifications

Please indicate the composition of the team you propose to provide for the project. In particular:

- Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TOR;

4.4 Vendor Registration Form

If your company is not yet registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex C) along with a bank statement or letter of confirmation from the bank or any other official document demonstrating ownership of the bank account declared.

4.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) and include the signed copy into your submitted Technical Proposal.

4.6 Applicable Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) and include the signed copy into your submitted Technical Proposal.

5 Evaluation

5.1 Technical Evaluation

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: 70% (on a 100 points scale, i.e. 70 points max) from the total score.

Company (max 20 points)	Qualifications	Documents, information to be provided to establish compliance with the set criteria
Service provision experience in the individual giving fundraising sector (max 5 points)		<p>The scores will be allocated for the number of years in the charity sector, based on the evidence provided.</p> <p>Please provide the below documents to prove financial soundness and legal existence:</p> <ul style="list-style-type: none"> • Last balance sheet, last year audit reports or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company's financial soundness and stability. • Company certificate / certificate of incorporation
Service provision experience in the non-profit (i.e. charity) sector (max 7.5 points)		<p>The scores will be allocated for the number of clients in the charity sector, based on the evidence provided.</p> <p>Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted <u>in case of selection</u>.</p>
Delivery of industry leading fundraising creative, products and campaigns in the last 5 years (7.5 points)		<p>Demonstration of fundraising creative, products and campaigns delivered in the last 5 years in the charity sector. A short explanation and the list of fundraising products and campaigns will be enough.</p> <p>The scores will be allocated for the quality of fundraising products and campaigns delivered in the last 5 years, as presented through a minimum of three case studies, with an indication of success.</p>
Proposed Services (max 40 points)		Documents, information to be provided to establish compliance with the set criteria
Clear demonstration of capacity and capability to deliver services as outlined under Section 2 (20 points)		Comprehensive proposal outlining your company's capability and capacity to address requirements under section 2. This section must be detailed, focusing on services listed under section 2.

Outline your company's approach to delivering best in class agency/client service (20 points)	Clear strategy proposed for account management. The scores will be allocated for the quality of the client service proposed to manage UNHCR account.
Personnel Qualifications (max 10 points)	Documents, information to be provided to establish compliance with the set criteria
Experience and skills of core team who will work on UNHCR project.	Seniority and expertise of the key staff assigned to the account. The scores will be allocated for the number of years` of experience of the core team assigned to UNHCR.

The minimum passing scores 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.

5.2 Financial Evaluation

The max score allocated to the financial components is 30% (of the total scores), i.e. max 30 points. The financial proposal is to be submitted **ONLY** by filling in Annex B. No other format will be accepted.

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.

Please use Annex B to provide a financial proposal as per below scenario. Your financial proposal should provide a clear breakdown on the cost related to the scenario. Please indicate clearly the total cost required to carry out all activities. Please also indicate separately the different daily consultancy rates your company applies.

5.2.1 Financial Offer Evaluation Scenario

Please base your offer on the following criteria to develop a fundraising campaign for an emergency such as the COVID-19 pandemic.

1. To develop an overall creative concept for the campaign.
2. To develop the following creative assets that can be provided to markets for localization/translation

Warm assets

- Supporter direct mail pack, comprising outer envelope, 4-page A4 (or equivalent) letter incorporating response coupon, 2-page A5 (or equivalent) lift device and a reply envelop.
- A version of the supporter direct mail pack, incorporating the same defined elements, but written for middle donors (those who give between \$1,000 and \$9,999 annually).

- A donation page banner (jpg or gif) example: <https://donate.unhcr.org/gb/winter-cash-monthly/~my-donation>
- Graphic of ask items to use on email and donation page: example <https://donate.unhcr.org/gb/winter-cash-ins/~my-donation> (emergency winter payments)
- 4 email banners (Teaser email, E-Appeal, Reminder, Thank you)

Cold assets

- A cold direct mail pack, comprising outer envelope, 4-page A4 (or equivalent) letter incorporating response coupon, 2-page A5 (or equivalent) lift device and a reply envelop.
- A press advertisement – equivalent to a quarter page in a tabloid newspaper
- A face-to-face pitch cards
- Email appeal copy and banner for cold email acquisition
- A donation page banner (jpg or gif) example: <https://donate.unhcr.org/gb/winter-cash-monthly/~my-donation>
- Graphic of ask items to use on email and donation page: example <https://donate.unhcr.org/gb/winter-cash-ins/~my-donation> (emergency winter payments)
- A welcome pack, comprising outer envelope, 2-page A4 (or equivalent letter) and a 4 page A5 (or equivalent) information sheet
- A welcome email copy + email banner

6 Key Performance Indicators

UNHCR will monitor the performance of the selected suppliers on a regular basis. Among the performance indicators, UNHCR will include the following:

- Quality of creative for campaigns and products
- Being culturally attuned to working across several markets
- Timely delivery of campaigns and products.
- Quality of account management service.
- Overall impact of the campaigns and products developed.

Depending on the level of activity going through the agencies at any one-time, regular review meetings or calls will be undertaken.