

DATE: 10/06/2020

REQUEST FOR PROPOSAL: No. 2020-RFP-008

**FOR THE ESTABLISHMENT
OF FRAME AGREEMENT FOR THE PROVISION OF**

Global Creative Individual Giving (IG) Marketing Services

UNHCR Private Sector Partnerships

CLOSING DATE AND TIME: 05/08/2020– 23:59 hrs CEST

INTRODUCTION TO UNHCR

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established on December 14, 1950 by the United Nations General Assembly. The agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It strives to ensure that everyone can exercise the right to seek asylum and find safe refuge in another State, with the option to return home voluntarily, integrate locally or to resettle in a third country. It also has a mandate to help stateless people. In more than six decades, the agency has helped tens of millions of people restart their lives. Today, a staff over 10,000 people in more than 128 countries continues to help some 63.5 million persons. To help and protect some of the world's most vulnerable people in so many places and types of environment, UNHCR must purchase goods and services worldwide. For further information on UNHCR, its mandate and operations, please see <http://www.unhcr.org>.

1. REQUIREMENTS

The Office of the United Nations High Commissioner for Refugees (UNHCR), Private Sector Partnerships Section, invites qualified service providers to make a firm offer for the provision of global creative individual giving (IG) marketing services.

IMPORTANT:

Terms of Reference (ToRs) are detailed in **Annex A** of this document.

UNHCR is looking for service provider(s) to enter into frame agreement for three (3) years, potentially extendable for a further period of one plus one (1+1) year with subject to satisfactory performance. The successful bidder will be requested to maintain their quoted price model for the duration of the Frame Agreement.

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.

Other United Nations Agencies, Funds and Programmes shall be entitled to the same prices and terms as those contained in the offers of the successful bidders and could form the basis for a Frame Agreement with other UN Agencies.

It is strongly recommended that this Request for Proposal and its annexes be read thoroughly. Failure to observe the procedures laid out therein may result in disqualification from the evaluation process.

Sub-Contracting: Please take careful note of article 5 of the attached General Terms and Conditions (Annex D).

Note: this document is not construed in any way as an offer to contract with your firm.

2. BIDDING INFORMATION:

2.1. RFP DOCUMENTS

The following annexes form integral part of this Request for Proposal:

Annex A:	Terms of Reference (TORs);
Annex B:	Financial Offer Form;
Annex C:	Vendor Registration Form;
Annex D:	UNHCR General Conditions of Contracts for the Provision of Services – 2018;
Annex E:	UNHCR Special Data Protection Conditions;

2.2 ACKNOWLEDGMENT

We would appreciate your informing us of the receipt of this RFP by return e-mail to Andrea Perecz, Sr. Supply Associate, perecz@unhcr.org:

- Your confirmation of receipt of this request for proposal
- Whether or not you will be submitting a bid

2.3 REQUESTS FOR CLARIFICATION

Bidders are required to submit any request for clarification or any question in respect of this RFP only to Andrea Perecz, Sr. Supply Associate, perecz@unhcr.org:

The deadline for receipt of questions is 23:59 hrs. CEST on 24/06/2020.

UNHCR will reply to the questions received as soon as possible by email to all bidders who have confirmed their intention to submit a bid in line with the provision outlined in paragraph 2.2 above.

Correspondence with any other UNHCR staff member or contractor in respect of this RFP is not permitted and may constitute grounds for disqualification. Bidders are requested to keep all questions concise.

IMPORTANT:

Please note that Bid Submissions are **not** to be sent to the e-mail address above.

UNHCR may, at its discretion, copy any reply to a particular question to all other invited bidders at once.

2.4 **YOUR OFFER**

Your offer shall be prepared in English.

Please submit your offer using the Annexes provided. Offers not conforming to the requested formats may be not taken into consideration.

IMPORTANT:

Inclusion of copies of your offer with any correspondence sent directly to the attention of the responsible buyer or any other UNHCR staff other than upload to the eTenderBox as per instruction in section 2.6 of this RFP "Submission of Bid" will result in disqualification of the offer.

Your offer shall comprise the following two sets of documents:

- Technical offer
- Financial offer

2.4.1 **Content of the TECHNICAL OFFER**

IMPORTANT:

No pricing information should be included in the Technical offer. Failure to comply may risk disqualification. The technical offer should contain all information required.

The Terms of Reference (TORs) of the services requested by UNHCR can be found in **Annex A**. Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

a. Description of the company and the company's 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;

Please make sure you provide all necessary documents requested above to establish compliance with the criteria.

Provide any other information that will facilitate our evaluation of your company's substantive reliability and financial and managerial capacity to provide the services. The bidders should demonstrate an in-depth understanding of the requirements from operational and strategic point of view.

b. 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.

c. 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;

Additional documents to be included in the Technical Offer:

- **Vendor Registration Form (Annex C):** If your company is not yet registered with UNHCR, you need to complete, sign, stamp and submit the form with your Technical proposal (**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.
- **UNHCR General Conditions for Provision of Services (Annex D):** Your Technical Offer should contain your acknowledgement of the UNHCR General Conditions for Provision of Services – 2018 by including in your technical offer **Annex D** signed by your company.
- **UNHCR Special Data Protection Conditions (Annex E):** Your Technical Offer should contain your acknowledgement of the UNHCR Special Data Protection Conditions including in your technical offer **Annex E** signed by your company.

2.4.2 Content of the FINANCIAL OFFER

Your separate **Financial Offer** must contain an overall offer in a single currency, either in US Dollars Euros or in the currency of your company's country.

The financial offer must cover all the services to be provided as stated in the TOR (price "all inclusive").

The Financial Offer is to be submitted as per the Financial Offer Form (Annex B) both in excel and in pdf format. Bids that have a different price structure will not be accepted.

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

UNHCR is exempt from all direct taxes and customs duties. With this regards, prices have to be offered without VAT.

You are requested to hold your offer valid for 180 days from the deadline for submission. UNHCR will make its best effort to select a company or companies within this period. UNHCR's standard payment terms are within 30 days after satisfactory implementation and receipt of documents in order.

The cost of preparing a bid and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.

2.5 BID EVALUATION:

2.5.1 Supplier Registration:

The qualified supplier(s) will be added to UNHCR's Supplier Database after investigation of suitability based on the submitted Vendor Registration Form and supporting documents.

The following documents are required for registration:

1. Fully completed Vendor Registration Form duly signed and stamped

Important: on the vendor registration form please provide your bank account confirming to the currency in which your financial offer is submitted.

2. Company Registration Certificate
3. Bank statement or letter of confirmation from the bank or any other official document demonstrating ownership of the bank account declared.

The investigation involves consideration of several factors such as:

- Financial standing;
- Core business;
- Track record;
- Contract capacity.

2.5.2 Technical and Financial 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 below the detailed scoring breakdown:

Company Qualifications (max 20 points)	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.

If a minimum score of 42 out of 70 is not reached, the technical proposal will be deemed technically non-compliant and will not proceed to the financial evaluation.

The **Financial offer** will use the following percentage distribution: **30%** from the total score.

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 will be allotted to the lowest price offer that is opened. All other price offers will receive points in inverse proportion to the lowest price; e.g., [total Price Component: 30] x [US\$ lowest offer]/ [US\$ other offer] = points for other supplier's Price Component.

For evaluation purposes only, the offers submitted in currency other than US Dollars will be converted into US Dollars using the United Nations rate of exchange in effect on the date the submissions are due.

2.6 SUBMISSION OF BID:

The offers must bear your official letter head, clearly identifying your company and the offers must be identified by an offer reference number.

Your proposal shall comprise the following documents:

- a) Technical Offer
- b) Financial Offer, using the provided form, submitted both in excel and pdf format

Please include your offer reference number, date and signature on both offers.

Bids should be submitted by file upload to eTenderBox, the online bid registration tool of UNHCR.

The eTenderBox can be accessed via the following URL: <http://etenderbox.unhcr.org>

In order to use eTenderBox, registration on the website is required. This registration is exclusively for eTenderBox and does not replace any other registrations for UNHCR applications. One Supplier should have only one registered email account in the system. Therefore, the Supplier must use only one eTenderBox account for managing its offers to UNHCR. In case the password is forgotten, that account cannot be used anymore and new registration is required. Registration Guide and User Manual of eTenderBox are available at the above URL.

IMPORTANT:

The Technical and Financial offers shall be clearly separated by uploading them to the appropriate category in the system. Failure to do so may result in disqualification.

Allowed extensions for files to upload are .doc, .docx, .xls, .xlsx, .rtf, .png, .jpg, .jpeg, .pdf, .txt, .zip, .ppt, .pptx, .bmp, .rar, .gif, .tif and .tiff. Executable files (.exe, .bat, .cmd...etc.) should not be uploaded. The maximum size limit per file is **10MB**.

Uploaded files can be amended by the Supplier while the tender is open. The selected files for upload are submitted when the '*Save & Submit*' button is clicked on. Therefore, this button has to be clicked before the deadline expires. If done so, the selected files will be submitted and uploaded successfully even if the deadline expires during the file upload. It is the Supplier's responsibility to ensure that all files of the final offer are submitted by the tender expiration deadline.

Once the deadline for submission is expired, the bid will be automatically closed after which the uploaded files can be reviewed but options for additional upload and deletion of previously uploaded files are not available anymore. In order to ensure the safe submission of the full and final offer, it is recommended to have all files uploaded well before the tender deadline.

Deadline: 05/08/2020, 23:59 hrs CEST.

IMPORTANT:

Any bid received after this date or sent to another UNHCR address may be rejected. UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective bidders simultaneously.

IMPORTANT:

The Financial Offer will only be opened for evaluation if the supplier's technical offer has passed the technical evaluation and has been accepted by UNHCR as meeting the technical specifications.

2.7 BID ACCEPTANCE:

UNHCR reserves the right to accept the whole or part of your bid, or to allow split or partial awards.

UNHCR may, at its discretion, extend the deadline for the submission of bids, by notifying all prospective suppliers in writing. The extension of the deadline may accompany a modification of the solicitation documents prepared by UNHCR at its own initiative or in response to a clarification requested by a prospective supplier.

Please note that UNHCR is not bound to select any of the firms submitting bids and does not bind itself in any way to select the firm offering the lowest price. Furthermore, the contract will be awarded to the bid considered most responsive to the needs.

2.8 CHANGES TO OR CANCELLATION OF RFP

UNHCR reserves the right in its discretion in compliance with its rules and regulations to increase or decrease the proposed content when awarding the contract and would not expect a significant variation of the prices submitted as a consequence of such changes. Any such change will be defined with the successful bidder(s) as part of the finalization of the Frame Agreement.

UNHCR reserves the right in its discretion to cancel this RFP or to not select any of the bidders for award.

2.9 CURRENCY AND PAYMENT TERMS FOR PURCHASE ORDERS

Any Purchase Order (PO) issued as a result of this RFP will be made in the currency of the winning offer(s). Such PO shall be in accordance with the terms of the Frame Agreement and shall identify the services, quantities if applicable, delivery lead times, as well as other applicable requirements and/or terms and conditions.

Payment will be made in accordance to the General Conditions for the Purchase of Services and in the currency in which the PO is issued. Payments shall only be initiated after confirmation of successful completion by UNHCR business owner.

2.10 UNHCR GENERAL CONDITIONS OF CONTRACTS FOR THE PROVISION OF SERVICES

Please note that the General Conditions of Contracts (**Annex D**) will be strictly adhered to for the purpose of any future contract. Bidders must confirm the acceptance of these terms and conditions in writing, by signing them off and including them in their technical offer.

Yours sincerely,



Fabrizio Bertora
Chief of Section, HQ Procurement
Supply Management Service
UNHCR