



**ANNEX A: TERMS OF REFERENCE
RFP/23/005/RBAP/PSP
REQUEST FOR PROPOSAL FOR THE PROVISION OF DIGITAL MARKETING SERVICES
FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN CHINA**

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to xxx The deadline for receipt of questions is xxx

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1 Introduction

1.1 Background

UNHCR, the UN Refugee Agency, is a global organization dedicated to saving lives, protecting rights, and building a better future for people forced to flee their homes because of conflict and persecution. We lead international action to protect refugees, forcibly displaced communities, and stateless people. Our vision is a world where every person forced to flee can build a better future.

Formally known as the Office of the High Commissioner for Refugees, UNHCR was established by the General Assembly of the United Nations in 1950 in the aftermath of the Second World War to help the millions of people who had lost their homes.

Today, UNHCR works in 137 countries. We provide life-saving assistance, including shelter, food, water and medical care for people forced to flee conflict and persecution, many of whom have nobody left to turn to. We defend their right to reach safety and help them find a place to call home so they can rebuild their lives. Long term, we work with countries to improve and monitor refugee and asylum laws and policies, ensuring human rights are upheld.

In everything we do UNHCR considers refugees and those forced to flee as partners, putting those most affected at the centre of planning and decision-making. For more information, please see <http://www.unhcr.org>

1.2 Private Sector Partnership Service (PSP) in China

In 2019, UNHCR China Office set up a new Private Sector Partnerships team to mobilize resources from the Chinese private sector to support our work globally. One of the key aspects in PSP's work is to expand UNHCR's engagement with the public including UNHCR's existing and potential supporters.

Digital fundraising has been evolving and developing in the last 4 years contributing to the overall income of PSP China. In collaboration with Chinese foundation partners, till 2023, PSP has launched 7 digital fundraising and communication campaigns on 5 digital fundraising channels including a newly established charity E-shop. UNHCR China recognizes the important role innovative digital activities play in acquiring new donors and retention tactics to nurture our relationships with our existing donors.

Building on experience and PSP China multi-year strategy, the team has developed concrete plans to expand the scope of digital fundraising and try innovative approaches in the market. Though exciting and promising, digital fundraising never stands alone in the reality of income generation. Its success always depends on both acquisition and donor retention strategies, plus continuous effort in network building among potential digital supporters.

1.3 Statement of Purpose & Objectives

UNHCR PSP China is looking to establish a frame agreement with qualified service provider(s) to assist in the development and management of digital fundraising programs. The objective is to recruit and retain high-quality supporters/donors through innovative channels and approaches, with a specific emphasis on donor acquisition, lead generation, and donor cultivation.

The agency(ies) should aim to develop, implement, execute, test, and optimize strategies that can deliver the

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maximum impact within the allocated fundraising budget. PSP China expects the selected agency to prioritize the following aspects and maximize return on investment (ROI):

- Promote online fundraising campaigns and optimize the performance;
- Supporters/donors acquisition, both one-off and regular;
- Improve supporter/donor loyalty and long-time value;
- Generate leads via digital engagements and innovative tools;

UNHCR is seeking a communications agency with proven digital expertise and experience in charity engagement to respond to this tender. The selected agency must demonstrate core digital competency and a track record in the field. Their responsibilities will include leading social media campaigns, covering supporter acquisition, lead generation, engagement, advocacy, and brand engagement. Additionally, the agency should be capable of providing integrated services, handling media channels effectively, and working closely with UNHCR to achieve campaign goals specifically in China.

UNHCR aims to enter a contract with a specialized agency(s) to provide a comprehensive range of digital and offline services. The core requirements are outlined in section 3 of the Request for Proposal (RFP). The following are essential criteria for vendors responding to this RFP:

- Integrated full-functional team based in mainland China, preferably with an office in Beijing.
- Capacity to provide full-service solutions, including acquisition, digital creative, content development, social media crisis prevention, and account management.
- Ability to handle digital media buying, partnerships with influencers/celebrities, media content planning and production, media clipping, and data analysis reporting.

The Frame Agreement will be signed with the successful bidder(s) for one (1) year and will be extended at the sole discretion of the UNHCR for additional two (2) years. Total length of contact is three (3) years.

- Phase 1: November 2023 - November 2024
- Phase 2: December 2024 - December 2025
- Phase 3: January 2026 - December 2026

Companies are requested to maintain the proposed fee structure for the duration of the contract.

1.4 Joint venture, sub-contracting

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company is the project led to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winner bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

1.5 Pre-selection criteria (mandatory to fulfil with this criteria):

To be eligible to participate at this bidding, **your company must have local office in mainland China** and your company must be authorized to work / do business in China. To establish compliance with this criteria, company profile and registration certificate are to be sent. Failure to comply with these pre-selection requirements, will result in disqualification. Only offers compliant with this Yes or No criteria will be considered for evaluation.

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2 Requirements

UNHCR PSP China would like to identify qualified companies based on the following sets of services:

- Creative Digital campaigns design and development
- Media buying, implementation, management, and reporting
- Innovation

2.1 *Creative digital campaigns design and development*

To achieve the goals of promoting digital charity programs and generating qualified leads, we expect the agency to create an overall digital strategy by creating, implementing, and testing various digital campaigns or supporter journeys, depending on season, event, thematic, emergency.

Please describe how you will:

Develop, implement, test and run digital campaigns like:

- Seasonal campaign: Winterization / End of Year;
- Thematic campaign: World Refugee Day, Women's Day, for example;
- Any other suggestions are welcome.

Create, implement, test and run journey such as:

- Supporter's journey: from one-off to loyal or regular;
- Supporters' journey: from lead generation to be converted through multi-channel;
- Development and maintain regular supporter care program;
- Welcome and stewardship programme for new supporters;
- Any other suggestions are welcome

The agency is also required to provide:

- Create microsites and websites for digital acquisition projects/campaigns;
- Develop and propose any creative content relevant to achieve our goals;
- Development and design of key message(s)/propositions which will appeal to the target audiences and reflects UNHCR's branding and areas of work;
- Development of creative display ads, using text, images, animation and video for display and retargeting within UNHCR branding;
- Develop social media advertising creatives;
- Test and optimize landing page to improve returns from search and paid advertising whether for charity or for a lead generation campaign;
- Develop copy, design and other formats of digital content for email marketing campaigns for subsequent communications to UNHCR supporters;
- Translation or writing of emails/newsletters/pushing news;
- Recommendations for landing page, website and email appeals design and content to offer a fully integrated supporter-centric online user experience;
- Recommendations and implement audience research and insights across multiple digital channels.
- Description of the core team dedicated to work with UNHCR PSP China to prove strong account management.
- Monitor and report on all key metrics and overall ROI;
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI. (Leads, optimization, landing page conversions etc.);
- Provide quarterly analysis reports assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of acquisition activities in previous quarter including detailed attribution tracking;
- Continuously optimize, adjust and recommendations to digital marketing program in order to achieve

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- digital engagement objectives, conversion rate and audience expansion targets;
- Provide all services in compliance with data protection regulations and GDPR;
- Enhance E-commerce development by creating promotional content, planning promotional events, and improving platform sections to enhance user experience;
- Collaborate with or manage other vendors to design UNHCR-related products for E-commerce and oversee mass production;
- Analyze and research emerging social media platform(s) and develop strategies for daily operations;
- Develop comprehensive event plans for both online and offline platforms and coordinate with various stakeholders to ensure the seamless execution of the events;
- In case of emergency, all focus needs to go to the emergency within 24 to 48 hours to be able to raise as much support as possible for the crisis and to boost global engagement. Please tell us how you propose to be ready for an emergency, where very fast production and implementation is required in pressing timings:
 - Which mechanism do you propose?
 - Do you already have tools to respond to such short implementation? Or which tools do you recommend setting up to be ready?
 - What kind of responsiveness are you able to offer?
 - Please propose a draft of an effective retro planning in case of an emergency campaign

2.2 Media buying, implementation, management, and reporting

- Develop annual media plan which leverages a diverse set of supporter acquisition strategies and channels to reach and convert new audiences;
- Manage all aspects of the paid media campaign (campaign set up, implementation and optimization) on a day to day basis and during emergency campaigns;
- Provide local management of UNHCR's advertising accounts on Tencent, Sina, Douyin, Youzan, Baidu and other platforms as needed;
- Propose account structure and manage the paid search engine marketing channel, implement and optimize this channel and ensure an overall positive ROI;
- Please provide recommendations for search creatives and optimization of search content;
- 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, native advertising or any other new digital channels based on latest trends and innovation for acquisition and brand awareness raising;
- Provide recommendations for conversion tracking and multichannel tracking.
- Monitor and report on all key metrics and overall ROI;
- Provide media/influencer/celebrity resource and pitching capability;
- Provide and describe media/influencer/celebrity relationship management experience;
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI;
- Provide continuous optimization, adjustments and recommendations to digital acquisition program, in order to achieve digital charity program performance and online supporter engagement objectives.
- Describe the team working on UNHCR account and the level of response to act on media buying activities in due time.

2.3 Innovation

- Please describe your view on innovation and which innovative projects you have done recently.

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- Please explain your suggestions and innovative ideas and approach for setting up a sustainable acquisition and retention programmes (including supporter/donor journeys) for UNHCR.

2.4 Performance of Work

The appointed vendor is responsible to provide all supervision, equipment, labor and materials necessary to complete the work as described herein. The vendor shall supervise and complete the project using its best skill and attention. The vendor shall furnish management, supervision, coordination, labor and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of these Terms of Reference.

All services rendered by the vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The vendor shall conduct all its activities in strict confidence. The vendor shall handle and respect data privacy, if applicable, in a professional manner.

2.5 Compliance with the Legal Requirement

The vendor shall comply with all China applicable laws, statutes, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the project. In addition, the vendor should comply with General Data Protection Regulation.

2.6 Customer Responsibilities

- Provide a dedicated project manager;
- Providing information and content about UNHCR's mission and activities;
- Provide logos, materials and existing campaign assets to be adapted to China local market as needed;
- Provide access to UNHCR content and brand guidelines for the elaboration of campaigns;
- Approve all media assets, keywords, and ad copy;
- Allow 3rd party trackers to be included in webpages if applicable;
- Share access and technical specifications for the CMS solution(s) and email platform to be used by the UNHCR if applicable
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROI's to ensure high level results and weekly meetings on progressions and deliverables of activities.

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3 Content of the Technical Offer

Your offer shall be prepared in English. Your technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information. There is no set format for the technical offer, it can be pdf, word, ppt etc. Please make sure you include all requested information to ease to technical scoring process.

No pricing information (i.e., fees) can be added to the technical offer. Please use Annex B (financial offer form) to confirm the overall cost proposal.

Please note that a general company profile or the signed ToR Annex A (this document) will not be accepted as technical offer.

3.1 Company Qualifications

During the technical evaluation, in this section, the panel will score the following aspects:

1. A core digital competency and experience shown through client references
2. A proven track record in delivering innovative and up to date, paid media campaign solutions with a predominant focus on digital channels
3. Relevant experience working with international companies, international non-profit organizations, charity foundations or United Nations organizations preferred.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score

1. your company's compliance regarding the required services listed under section 2 and the capacity to achieve the proposed targets under section 1.3
2. any innovative idea, strategy to acquire supporters and to improve conversion rate
3. samples are to be provided as listed under section 4

3.3 Staff qualifications, account management

Account management is crucial for running a successful digital campaign. This section is dedicated to measure the proposed customer service towards UNHCR PSP China team. During the technical evaluation, in this section, the panel will score the experience of the core people who will work on UNHCR project (based on the number of years and demonstration expertise in the area):

- Please indicate the composition of the team you propose to provide for the project.
- Please provide short biographies of core staff who will be working on the account.
- Please make sure you elaborate on this section properly to understand the level of support proposed for managing our account.

The below list consists of the technical expertise required; please provide a fee to ALL listed consultancy:

- Account Director
- Account Manager
- Senior Account Executive
- Creative Director
- Senior Copy
- Senior Art

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- Digital, UX/UI Manager
- Media planning Manager
- Data Analyst

3.4 Expected volume of work

PSP China estimated number of hours to be used for the different expertise is the following for year 1; from year 2 onwards the operation expects a +15% increase to cover for market growth.

- Account Director: 600 hours in year 1
- Account Manager: 1000 hours in year 1
- Senior Account Executive: 2000 hours in year 1
- Creative Director: 400 hours in year 1
- Senior Copy: 600 hours in year 1
- Senior Art: 600 hours in year 1
- Digital, UX/UI Manager: 300 hours in year 1
- Media planning Manager: 400 hours in year 1
- Data Analyst: 600 hours in year 1

PSP China estimated the below media spend (¥ CNY):

- Year 1: CNY 3,000,000
- Year 2: CNY 5,000,000
- Year 3: CNY 8,000,000

Please note that the above figures are PSP China best estimates based on experience and forecasting and it cannot be considered as commitment. The actual workload/volume will be defined via different projects and confirmed on the corresponding statement of work and purchase order.

3.5 Vendor Registration Form

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (ANNEX C).

3.6 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the provision of services (ANNEX D) and send back the signed version (each page initialed and dated) along with your technical proposal.

3.7 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) send back the signed version (each page initialed and dated) along with your technical proposal.

3.8 Content of Your Financial Proposal

Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown.

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4 Evaluation

Only offers passed the pre-selection will be technically evaluated.

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.

4.1 Technical evaluation

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Core digital competency and experience shown through client references (7.5 points)	Please provide three (3) reference letters from your current/previous clients outlining your company's performance in terms of core digital competency. <i>Please note that without letters, 0 points will be given</i>
A proven track record in delivering innovative and up to date (7.5 points)	A proven track record in delivering innovative and up to date, paid media campaign solutions with a predominant focus on digital channels. Please list your companies' projects (completed and/or currently underway) focusing on innovation with indicative success. The scores will be allocated for the number of projects listed.
Clients' list (5 points)	Relevant experience working with international companies, international non-profit organizations, charity foundations or United Nations organizations. The scores will be allocated for the number of clients listed.
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Creative Digital campaigns design and development (2.1) (15 points)	Comprehensive proposal to be presented to demonstrate capacity and capability to provide services as listed under 2.1, including: <ul style="list-style-type: none"> three (3) successful creative pieces <i>Please note that without samples, 0 points will be given</i>
Media buying, implementation, management, and reporting (2.2) (15 points)	Comprehensive proposal to be presented to demonstrate capacity and capability to provide services as listed under 2.2, including: <ul style="list-style-type: none"> one (1) sample media plan one (1) sample campaign management report one (1) sample of an analysis report <i>Please note that without samples, 0 points will be given</i>

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Innovation (2.3) (10 points)	Please explain any innovative suggestion your company has, in terms of campaigns, paid media strategy, channels, leads generation, charity program operations, supporter journey approach or any other strategy aimed to acquire quality, long-term committed high life-time value supporters and reduce the attrition rate.
Staff qualifications, account management (max 10 points)	Documents, information to be provided to establish compliance with the set criteria
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	<p>Experience of core people who will work on UNHCR project, including experience with similar projects.</p> <p>The scores will be allocated based on the average years' of relevant experience of the core people.</p> <ol style="list-style-type: none"> 1. Account Director 2. Account Manager 3. Senior Account Executive 4. Creative Director 5. Senior Copy 6. Senior Art 7. Digital, UX/UI Manager 8. Media planning Manager 9. Data Analyst <p>Please include: CV or bio of the people that will be assigned to UNHCR account (max half A4 page)</p> <p><i>Please note that without the CVs, 0 points will be given.</i></p>

Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal to be considered further in the financial evaluation process.

Companies might be requested to deliver a presentation based on their technical proposal via Teams. The dates for the presentations will be communicated in time.

4.2 Financial Evaluation

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

The maximum number of points (30) will be allotted to the lowest total price calculated based on the prices offered on Annex B. All other offers will receive points in inverse proportion to the lowest price.

The financial proposal is to be submitted ONLY by filling in Annex B. No other format will be accepted. UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes.

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5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier monthly according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of product and service
- Quick to market launch of emergency appeals/campaigns
- ROI for campaigns and media buy activities
- Number of donors and leads per month;
- Average monthly and one-off donations;
- Donor conversion rate;
- Performance of UNHCR brand awareness and conversion rate in China
- Overall teamwork between supplier and PSP China