

**Annex A: Terms of Reference**

**RFP/25/003/RBAP/PSP**

**(Cloud ERP reference UNHCR RFP 1145)**

**REQUEST FOR PROPOSAL**

**FRAME AGREEMENT FOR THE PROVISION OF DIGITAL MARKETING SERVICES  
FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN THE PHILIPPINES**

## Table of Contents

<b>1</b>	<b>Introduction .....</b>	<b>3</b>
1.1	Background.....	3
1.2	Private Sector Partnership Service (PSP) in the Philippines .....	3
1.3	Statement of Purpose & Objectives .....	4
1.4	Joint venture, sub-contracting .....	5
1.5	Pre-selection criteria (mandatory to fulfil with this criteria):.....	5
<b>2</b>	<b>Requirements .....</b>	<b>7</b>
2.1	Media buying, implementation, monitoring and reporting .....	7
2.2	Creative online campaign design and development .....	8
2.3	Fundraising, Innovation and Emergencies .....	8
2.4	Performance of Work.....	9
2.5	Compliance with the Government Requirement.....	9
<b>3</b>	<b>Payment Method .....</b>	<b>10</b>
<b>4</b>	<b>Evaluation.....</b>	<b>11</b>
4.1	Technical evaluation .....	11
4.2	Financial Evaluation .....	13
<b>5</b>	<b>UNHCR Responsibilities .....</b>	<b>14</b>
5.1	UNHCR Responsibilities.....	14
<b>6</b>	<b>Key Performance Indicators.....</b>	<b>15</b>
6.1	Performance Evaluation .....	15

## 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 forcibly displaced and stateless persons as partners, putting those most affected at the centre of planning and decision-making. For more information, please see <http://www.unhcr.org/ph>

### 1.2 Private Sector Partnership Service (PSP) in the Philippines

The Private Sector Partnerships (PSP) unit at UNHCR is tasked to maximise UNHCR's engagement with the private sector to mobilise support and resources for the refugee cause.

In the Philippines, the PSP team started in 2014 and has since engaged over 70,000 individual donors contributing a total of ~PHP970M by the end of 2024. Much of the income comes from donors acquired through the face-to-face program, but over the last few years, the digital acquisition program has shown potential for scaling up with respectable year-on-year growth.

While the pandemic years accelerated the digitalisation momentum in the Philippine market, the effectiveness of the digital acquisition program in the Philippines has been closely tied to global emergencies that generate significant coverage in local media. Previous successes during massive emergencies like Ukraine (2022) and Türkiye-Syria (2023) relied heavily on their local relevance and sustained media interest. Nonetheless, this shows that there is a pool of digitally-savvy donors in the Philippines that can be tapped for mostly one-off giving during high-visibility emergencies.

As a long-term market, the Philippines PSP team will contribute to the global goal to increase UNHCR's supporter base and build a sustainable funding stream from Filipinos while also increasing the level of awareness on the plight of refugees, stateless and internally displaced

persons in the Philippines and all over the world.

UNHCR Philippines seeks to grow its digital acquisition programme in collaboration with service providers to expand its reach and support from the Filipino donor market. It is necessary to sustain the digital acquisition growth trend and diversify fundraising channels especially to acquire quality regular giving donors, contributing to the annual income growth and strengthening donors' lifetime value. This engagement is planned to commence in March 2025.

UNHCR Philippines seeks to collaborate with qualified digital media/marketing/performance agency to further develop our digital acquisition program. The service provider must have proven experience and keen expertise on digital fundraising/marketing/performance campaigns, specifically in acquiring online donations through digital marketing. The service provider will support UNHCR Philippines digital fundraising activities.

---

### **1.3 Statement of Purpose & Objectives**

---

The purpose of the present RFP is to select a digital agency/agencies as the successful bidder(s) to support UNHCR Philippines in developing and delivering digital acquisition campaigns to recruit quality donors through innovative channels or drivers, with a **specific focus on monthly donation** (regular giving).

The successful bidder(s) must be **based in the Philippines** and **have in-depth knowledge of the digital landscape, demographic and consumer behaviors in the Philippines**, including wide knowledge in local nuances and cultural context to –

- Develop and execute online fundraising strategy and across all channels
- Creative development as required to implement and execute the strategy
- Promote online fundraising campaigns and optimize performance towards monthly donation (regular giving).
- Increase the number of online donations and grow the database of online donors (at least 10% every year) with average 45 new donors per month in 2025.
- Fast track campaign execution during emergency situations
- Increase average donation number of online donors – PHP 5,000 for one-off donation and PHP 1,000 for monthly donation.

The successful bidder(s) goal is to develop, implement, execute, test, and optimize the most effective strategies, to achieve the greatest possible impact for a given fundraising budget. The responsibilities will include campaign strategy, media buying, implementation, management, optimization, tracking, and reporting.

The frame agreement (FA) will be signed with the successful bidder(s) for an initial period of twelve (12) months (Phase 1) and will be extended at the sole discretion of UNHCR for additional two times twelve (12) months (Phase 2), upon satisfactory evaluation of the first six months of phase one and evaluation of performance each year. Services will be evaluated based on the number of qualities of the new donors that recruited, and cost performance benchmarks agreed upon in advance between UNHCR and the vendor.

**Tentative start dates**

Phase 1 - 1 May 2025 until 30 April 2026 (12-months)

Phase 2 - 1 May 2026 until 31 April 2028 (24-months)

**In UNHCR's acquisition strategy, both quantity and quality are of high importance. Meaning UNHCR is not only aiming for volume, but for committed monthly donors with high lifetime value (LTV) too.**

The successful bidder(s) are required to manage and implement digital donor acquisition activities to help achieve the following targets and maximize return on investment (ROI):

- Phase 1 – Donor numbers One Off: 440 and Regular Giving: 110 Donors
- Phase 2 – Incremental increase in donor volume subject to budget approval and performance review

The targets mentioned above need to be realized with a cumulative ROI of at least:

- 1.3 for 12-month period

UNHCR Philippines estimates the total cost for digital services including media cost and management fees as below –

- Phase 1 – USD80,000 / PHP4.6M
- Phase 2 – Subject to budget approval and performance review

UNHCR PSP Philippines may appoint a back-up agency/agency to set up additional digital fundraising/marketing activities in a more sustainable way. The back-up service provider will be activated in case the main provider fails to perform or might encounter capacity issues.

**Agencies are requested to indicate in their bids their maximum capacity and availability, as well as to give feedback on the expected percentages and KPIs to get a realistic indication. Agencies are also 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 PSP Philippines 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 in this bidding, your company must be compliant with the below pre-selection criteria. Failure to comply will result in disqualification. Please fill in Annex B – technical response form for pre-selection.

Pre-selection criteria	Documents, information to be provided to establish compliance with the set criteria
<b>You company must have a local operation in the Philippines.</b>	Please confirm the location of your operation and office in Philippines. To establish compliance please <b>send your company registration certificate.</b>
<b>Compliance with UNHCR Special data protection conditions</b>	<p>Acknowledge the Supplementary Agreement on protection of personal data, including UNHCR special data protection conditions, in its entirety. Please:</p> <ul style="list-style-type: none"> <li>• add your company name</li> <li>• representant name</li> <li>• date</li> <li>• signature</li> </ul> <p>to the last page of <b>Annex E</b> and send along with your proposal. This agreement will be tailored made and signed with the selected company, as part of the frame agreement</p>
<b>Acceptance with UNHCR general terms and conditions</b>	<p>Acceptance of UNHCR general terms and conditions in its entirety, please add to the last page:</p> <ul style="list-style-type: none"> <li>• your company name</li> <li>• representant name</li> <li>• date</li> <li>• signature</li> </ul> <p>to all pages of <b>Annex D</b> and send along with your proposal</p>
<b>Compliance with UN Supplier Code of Conduct</b>	Please acknowledge UN Suppliers Code of Conduct ( <b>Annex G</b> )

*\* In case your company is a registered (PO supplier) to UNHCR Philippines, i.e., you have already received purchase orders, there is no need to re-send the above documents unless some changes are to be implemented on your current profile (address, bank account etc.). Please add the necessary comments to your technical offer. Compliance with the rest of the pre-selection criteria is still mandatory.*

## 2 Requirements

### Standard activity requirements:

- Set up pre-launch meetings with UNHCR PSP Philippines staff to understand UNHCR's fundraising operation and project requirements.
- Successful bidder(s) should manage the project within mutually agreed period, update UNHCR staff periodically for campaign progress, implement mutually agreed decisions and deliver quality content to UNHCR's targeted audience.
- Timely and prompt coordination to complete and deliver all finalized campaign and materials to UNHCR, which result in reaching donors on time and as defined in the annual plan.
- UNHCR focal point will work with the agency throughout the process and will determine on the requirement depending on the campaign.

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

- Media planning, implementation, management, optimization, monitoring and reporting
- Fundraising and innovation
- Effectiveness in emergencies

---

### **2.1 Media buying, implementation, monitoring and reporting**

---

- a. Develop and execute digital media plan (with monthly plan) and innovative strategies to reach and acquire new donors, achieve the media ROI and KPIs as agreed with UNHCR/PSP Philippines.
- b. Manage UNHCR PSP Philippines' ad accounts and support digital performance marketing activities on Meta, Google, YouTube, TikTok, LinkedIn and other online platforms as needed.
- c. Manage media buying services including paid search ads, online/social/real-time bidding/programmatic media, or any other types of digital media.
- d. Constantly review and optimize performance for the best possible CPA/ROI/target donations and adjust media plan and media buying as appropriate.
- e. Manage the measurement and analysis of online donor acquisition performance.
- f. Monitor and report on all key metrics and overall ROI.
- g. Provide weekly/monthly/yearly reports and/or performance dashboards including all key media, donation results, and CPA/ROI and KPIs.
- h. Use Google Tag Manager (GTM) and Google Analytics (GA4) as well as paid media tracking for reporting and testing. Use UNHCR UTM naming conventions for all ads and marketing campaigns.
- i. Provide continuous optimization, adjustments, and recommendations to digital acquisition program/digital performance campaign, to achieve digital fundraising and online donor engagement objectives.

- j. Provide strategic advice or recommendations to support to maximize performance based on results.

---

## **2.2 Creative online campaign design and development**

---

To achieve the goals of promoting digital fundraising campaign, the successful bidder(s) need to create an overall digital strategy by creating, implementing, and testing various digital campaigns and/or supporter journeys, depending on event, thematic, emergency and season.

**Please describe how you will:**

Develop, implement, test and run digital campaigns like:

- Thematic campaign: Climate campaign, Refugees in the Philippines, Birth registration campaign for populations at risk of statelessness
- Seasonal campaign: World Refugee Day, Christmas/Year End campaign
- Emergency campaigns
- Any other suggestions are welcome

The agency is also required to provide:

- Development and design of compelling key message(s)/proposition(s) which will appeal to the target audiences and reflects UNHCR's branding and areas of work.
- Development of creative dynamic display ads, using text, images, animation and video for prospecting new donors and retargeting engaged donors on web and social media networks.
- Mapping and implementation of audience research and insights on digital
- Optimize and test donation landing page to improve returns from search and paid advertising whether for fundraising or lead generation campaign
- Recommendations for landing page and ad design and content to offer a fully integrated supporter-centric online user experience
- Monitor and report on all key metrics and overall ROI
- Provide weekly and monthly performance reports. Provide annual 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 digital marketing program in order to achieve digital engagement objectives, conversion rate and audience expansion targets
- Provide all services in compliance with data protection regulations

---

## **2.3 Fundraising, Innovation and Emergencies**

---

- a. Please provide your experience working with charitable organisation, non-government organisation and/or non-profit organisation if any.
- b. Please describe your view on innovation and which innovative projects you have done



recently. Include your suggestions and innovative ideas and approach for setting up a sustainable donor acquisition for UNHCR, including how to achieve repeat gifts in their donor life cycle.

- c. In case of emergency, all focus needs to go to the emergency within 24 to 48 hours to be able to raise as many funds as possible for the crisis and to boost engagement. Please tell us how you propose to be ready for an emergency, where very fast production and implementation is required in pressing timings:
  - a. ✓ Which mechanism do you propose?
  - b. ✓ What kind of responsiveness are you able to offer?
  - c. ✓ Please propose a draft of an effective planning in case of an emergency campaign

---

## **2.4 Performance of Work**

---

The appointed vendor is responsible for providing 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 Government Requirement**

---

The vendor shall comply with all Philippines 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.

### **3 Payment Method**

UNHCR shall pay the awarded vendor within thirty (30) days after satisfied completion of services every month. Payment shall be made against a monthly invoice submitted by the vendor.

## 4 Evaluation

Please note only offers that have passed the pre-selection will be technically evaluated. Please fill in **Annex F** – technical response form with the requested technical criteria.

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 paid media solutions. (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.
Service provision experience (client based) (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
Compliance with the services required under section 2.1 Media Buying, implementation, management and reporting) (20 points)	Comprehensive proposal presented including all services listed under point 2.1.,  A description of your strategy on how to provide the best quality service in compliance with all services listed under section 2. Please

	<p>confirm capability to achieve proposed targets.</p> <p>Please list at <b>least two (2)</b> examples demonstrating your agency's experience in digital marketing services in the Philippines from the past 3 years.</p> <p><i>Please note that if you don't add information about this section on Annex B, 0 point will be given.</i></p>
Compliance with the services required under section 2.2 creative online campaign design and development (20 points)	<p>Comprehensive proposal to be presented to demonstrate capacity and capability to provide services as listed under 2.2, including:</p> <ul style="list-style-type: none"> <li>• one (1) sample campaign management summary report</li> <li>• one (1) digital media buying billing and report.</li> </ul> <p>In your response, please include your strategy to acquire donors through digital fundraising campaigns.</p> <p><i>Please note that without samples, 0 points will be given</i></p>
<b>Staff qualifications, account management (max 10 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
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 successful bidder(s) must have dedicated media planner (account manager) and media buyer (ops) with minimum 3 years' experience in the Philippines.</p> <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 C. All other offers will receive points in inverse proportion to the lowest price.

The financial proposal is to be submitted ONLY by filling in Financial Quotation (**Annex C**). 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. Please use single currency (PHP) to provide your fee structure and sum up the total cost for your Services. Your Financial Quotation must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection.

## 5 UNHCR Responsibilities

### 5.1 UNHCR Responsibilities

- Providing a dedicated focal point/project manager.
- Providing information and content about UNHCR's mission and activities.
- Providing all logos and materials.
- Providing landing page and e-commerce environment, and tracking requirements.
- Providing campaign/media brief and sharing budget plans.
- Approve all media assets, keywords, and ad copy.
- Provide access to Google Analytics (GA4) for reporting and audience planning.
- Provide existing campaign assets to be adapted to the 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.
- Informing the agencies about expectations concerning reporting, statistics, key performance indicators and ROIs to ensure high level results and weekly meetings on progressions and deliverables of activities.

## 6 Key Performance Indicators

### 6.1 *Performance Evaluation*

UNHCR expects to monitor the performance of the successful bidder(s) on a regular basis according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of campaign implementation and execution
- Quick to market launch/readiness in emergency situations
- ROI for campaigns and media buy activities
- Number of new donors acquired per month
- Average monthly and one-off donation
- Cost per acquisition/acquired donor (CPA)
- Conversion Rate (CVR)
- Click Through Rate (CTR)
- Performance of UNHCR brand awareness in the Philippines
- Overall teamwork between successful bidder(s) and PSP Philippines