



Annex A: Terms of Reference

RFP/23/021/NETHERLANDS/PSP

**Request for proposal for the
provision of digital media services for UNHCR Private Sector Partnerships in the Netherlands**

Table of Contents

1	Introduction.....	3
1.1	Background.....	3
1.1.1	Private Sector Partnership Service (PSP) in the Netherlands	3
1.2	Statement of Purpose & Objectives.....	3
	Media buying, implementation, management and reporting.....	Error! Bookmark not defined.
2	Requirements.....	6
	Pre-selection criteria (mandatory to fulfil with this criteria):.....	Error! Bookmark not defined.
2.1	Media buying, implementation, management and reporting	6
2.2	Innovation & emergencies	6
2.3	Performance of Work.....	7
2.4	Compliance with the Government Requirement.....	7
3	Content of the Technical Offer	8
3.1	Company qualifications	8
3.2	Proposed services	8
3.3	Staff qualifications, account management.....	8
3.4	Vendor Registration Form	Error! Bookmark not defined.
3.5	Applicable General Conditions	Error! Bookmark not defined.
3.6	Special Data Protection Conditions	Error! Bookmark not defined.
4	Technical and financial evaluation	9
4.1	Technical evaluation for Media buying, implementation, management and reporting	9
4.2	Financial Evaluation	10
5	Customer responsibilities	11
6	Key Performance Indicators.....	12
6.1	Performance Evaluation	12

1 Introduction

1.1 Background

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 18,000 personnel is helping more than 89 million people in 137 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>.

1.1.1 Private Sector Partnership Service (PSP) in the Netherlands

The primary purpose of the Private Sector Partnership Service (PSP) in the Netherlands is to generate income from individual donors, corporates, and foundations, to support UNHCR activities worldwide. PSP activities in the Netherlands started in 2016 and now include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Partnerships & Philanthropy (PPH) seeking support from companies, foundations, and High Net-Worth individuals and through Gifts in Wills.

Within the Individual Giving strategy, PSP Netherlands' primary objective is to continue increasing its donor base with high quality donors.

Face-to-Face is currently our largest regular donor acquisition channel. But as part of our strategy to diversify the fundraising program, digital acquisition is of great importance for donor acquisition (mainly one-off donations) and to increase UNHCR brand awareness and positioning in the Netherlands.

We are currently running digital acquisition through paid search campaigns and social advertising. Digital is and will remain one of our main acquisition channels. To retain and develop our donors we provide them journeys such as monthly newsletters and other updates about UNHCR's work through e-mail marketing.

Due to the success of our local acquisition campaigns, we expect increased commitment and subsequent additional budget to become available via the international organization in the coming years. We are determined to continuously improve our digital fundraising environment from an acquisition (and conversion) standpoint – both from a creative and technical perspective. We plan to run advocacy and engagement campaigns to secure new email leads for subsequent fundraising efforts, including legacy fundraising. We aim to test more within our online direct response campaigns in the years to come, with a substantial digital component including new digital channels, email marketing and paid social media.

The objective of the Partnerships & Philanthropy team is to become the Dutch private sector's partner of choice on the issue of forced displacement. Strengthening visibility and UNHCR positioning as thought leader to increase awareness through advertisements is key. We are planning to increase our digital media campaigns in the coming years, mostly focusing on legacy campaigns (boosting awareness, generating leads and securing legacy funds) through social media, online newspapers and on- and offline commercials. In addition to legacies, we aim to position ourselves as thought leader to increase awareness at our targeted groups (corporates, foundations and major donors in the Netherlands) during key moments (e.g. emergencies, World Refugee Day) on social media (mostly LinkedIn).

Please note that UNHCR Netherlands has an ANBI status; donations to UNHCR are therefore tax deductible.

Important to note we are currently not eligible for a Google Grants account.

1.2 Statement of Purpose & Objectives

The purpose of the present selection process is to establish a Frame Agreement with one or more digital agency/ (ies) to support UNHCR Netherlands in developing and managing digital acquisition programs to recruit and retain quality donors through various innovative channels or drivers, with a specific focus on donor acquisition as well as quality leads, to:

- Increase online donations, both one-off and regular.
- Improve donor loyalty and long-time value.

- Generate leads and broaden constituency.

The agency/(ies) goal is to develop, implement, execute, test, and optimize the most effective strategy/(ies), to achieve the greatest possible impact for a given fundraising budget. PSP Netherlands expects from the agency to maximize ROI.

Netherlands may appoint a primary and a back-up supplier to set the digital program up in a more sustainable way.

The Frame Agreement will be signed with the successful bidder(s) as per below phases:

- Phase 1: July 2023 - June 2024
- Phase 2: July 2024 – June 2025
- Phase 3: July 2025 – June 2026

The selected vendor is required to manage and implement digital donor acquisition activities to help achieve the following targets:

- July 2023 - June 2024: Donor numbers One Off: 13,500 and Regular Giving: 1,350
- July 2024 - June 2025: Donor numbers One Off: 14,500 and Regular Giving: 1,600 + leads: 10,000
- July 2025 - June 2026: Donor numbers One Off: 16,000 and Regular Giving: 1,950 + leads: 15,000

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

- 0.7 for a 12-month period
- 1.5 for 24 months
- 2.1 for 36 months

The selected vendor is required to achieve the target of 1.5 ROAS (Return on ad spend) for digital acquisition of one-off donors.

Agencies are also requested to indicate in their bids their maximum capacity and availability, as well as to give feedback on the expected percentages and KPI's to get a realistic indication.

1.3 Joint venture and 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 lead to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winning 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.

1.4 Pre-selection criteria (compliance with these criteria is mandatory)

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.

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Your company must be registered and eligible to do business in Netherlands	To establish compliance with these criteria: 1. Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent* 2. Vendor registration form to be filled out and submitted (Annex E)*
Data protection	Compliance with UNHCR data protection clause, please sign Annex D and send along with your proposal.

* In case your company is a registered (PO supplier) to UNHCR Netherlands, 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.***

1.5 Mandatory samples to be sent for technical scoring

Please take note of the requested samples for technical scoring, see evaluation details under section 4. Please note that without samples, 0 points will be given for the corresponding technical scoring aspect.

- One (1) example of a search media plan
- One (1) example of weekly/monthly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI
- one (1) example of a campaign analysis report.

2 Requirements

Please present your proposal in English.

2.1 Media buying, implementation, management, and reporting

PSP Netherlands planned media spend is confirmed on Annex B, to indicate the volume of the market growth and investment funds for each phase.

- Co-develop an annual media plan (with monthly iterations) which leverages a diverse set of (brand) awareness strategies and channels to reach new audiences;
- Co-develop an annual media plan (with monthly iterations) which leverages a diverse set of donor acquisition strategies and channels to reach and convert new audiences;
- Provide local management of UNHCR's ad accounts on Google Ads, Microsoft ads and other search platforms as needed; Manage all aspects of the Search paid media campaign (campaign set up, implementation and optimization) on a day-to-day basis and during emergency campaigns; Ensure an overall positive ROI;
- Provide recommendations/advice for search creatives and optimization of search content;
- Provide strategic inputs for our creative approach and audience targeting strategies for paid social advertising;
- 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 donor acquisition and brand awareness raising;
- If relevant to reach our goals: provide recommendations for email list rentals, site takeovers and additional forms of digital acquisition.
- Provide required number of quality leads through lead generation activities to UNHCR for donor conversion;
- Provide and implement recommendations for conversion tracking and multichannel tracking;
- 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;
- Provide continuous optimization, adjustments, and recommendations to (brand) awareness campaigns, and to the digital acquisition program, to achieve digital fundraising and online donor engagement objectives from both IG and PPH.

2.2 Innovation & emergencies

- 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 and retention programmes (including donor journeys) for UNHCR.
- **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 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?
 - ✓ What kind of responsiveness are you able to offer?
 - ✓ Please propose a draft of an effective planning in case of an emergency campaign.

2.3 Expected volume of work

PSP Netherlands 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 +15-20% increase to cover for market growth.

- 175 hours for Digital strategy specialist (including lead-gen and donor acquisition, annual media plan, etc.)
- 350 hours for Digital advertising specialist (Paid search, social and display, incl bidding/negotiating with vendors for advertising)

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to Erzsebet Gal at galer@unhcr.org. The deadline for receipt of questions is the 19th of April 23:59 pm cet via email.

- 75 hours for Data & Analytics Specialist (conversion tracking and multi-channel tracking, tag-management, reporting, etc)
- 75 hours for SEO & Content marketing specialist

PSP Netherlands estimated the below media spend (Euro):

- Year 1: 1,090,000.00
- Year 2: 1,105,000.00
- Year 3: 1,375,000.00
- Total: 3,570,000.00

Please note that the above figures are PSP best estimate for digital media activities and cannot be considered as financial commitment. The actual budget to be implemented, along with the number of hours for the activities will be agreed prior to the campaign with the selected supplier.

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 Government Requirement

The vendor shall comply with all Dutch 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 European General Data Protection Regulation.

3 Content of the Technical Offer

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). During the technical evaluation, in this section, the panel will score your company`s *digital media service provision experience in the non-profit*.

Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

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 the relevant sub-sections of section 2 and the capacity to achieve the proposed targets* and (2) *any innovative idea, strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate*.

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 PSP Netherlands 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 make sure you elaborate on this section properly, to understand the level of support proposed for managing our account.

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

4 Technical and financial 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 15 points)	Documents, information to be provided to establish compliance with the set criteria
Digital media service provision experience in the non-profit sector in terms of clients (15 points)	<p>The scores will be allocated for the number of <i>clients</i> (previous and current in total from the past 5 years) in the non-profit sector (i.e., charity), 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>
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Compliance with the requirements listed under 2.1 (15 points)	<p>A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1, including:</p> <ul style="list-style-type: none"> • One (1) example of a search media plan • One (1) example of weekly/monthly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI <p><i>Please note that without the samples 0 points will be given!</i></p>
Capability to achieve proposed ROAS listed under 1.2 (15 points)	<p>Comprehensive proposal to be presented to demonstrate capacity to achieve the proposed ROAS, including:</p> <ul style="list-style-type: none"> • one (1) example of a campaign analysis report; <p><i>Please note that without the samples 0 points will be given!</i></p>
Any innovative idea, strategy to acquire quality, long-term committed high life-time value donors and reduce the attrition rate (10 points)	Any innovative idea to be presented to acquire quality, long-term committed high life-time value donors and reduce the attrition rate.
Staff qualifications, account management (max 15 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) (10 points)	<p>The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.</p> <ul style="list-style-type: none"> • Please indicate the composition of the team you propose to provide for the project. • Describe whether you can provide adequately skilled people to assume the responsibilities and perform the full range of tasks included in the TOR;

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

	<ul style="list-style-type: none"> Please provide short biographies of core staff who will be working on the account (max half A4 page)
Account management / client service (5 points)	Short explanation on your customer service approach, account management strategy to support PSP Netherlands, i.e. customer service approach.

The minimum passing scores of the evaluation is 40 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 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 (cost per donor) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

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

5 Customer responsibilities

PSP Netherlands will be responsible for:

- Appointing a dedicated project manager;
- Providing information and content about UNHCR's mission and activities;
- Providing logos and materials;
- Providing input on materials used by the vendor;
- 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;
- If needed, accessing and /or working in Business Managers (social media), Bing and Google campaign set-up environments.

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

6 Key Performance Indicators

6.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis according to the following KPI's:

- Average monthly and one-off donation;
- Donors per month;
- Leads per month;
- ROI;
- Cost per lead;
- Cost per recurring and one-off donor;
- CTR (Click Through Rate);
- LCR (Lead Conversion Rate);
- Donor conversion rate;
- Live Time Value forecast;
- UNHCR Brand awareness;
- CPM (Cost per 1,000 impressions);
- Supplier readiness in emergency situations;
- Overall teamwork between supplier and PSP Netherlands.