

Annex A: Terms of Reference

RFP/24/028/CANADA/PSP

**Request for proposal for the provision of TV media buying services for
UNHCR Private Sector Partnerships in Canada**

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

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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 20,000 personnel is helping more than 100 million people in over 135 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 Canada

The primary purpose of the Private Sector Partnership Service (PSP) in UNHCR Canada is to generate income from individual donors, corporates, and foundations, to support UNHCR activities worldwide. PSP activities in Canada include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Philanthropy (PPH) seeking support from companies, foundations, small and medium sized enterprises (SMEs) and High Net-Worth individuals.

Within the Individual Giving strategy, DRTV (direct response TV) launched in 2017 with great success in Canada. DRTV is expected to continue to play an important role for donor acquisition in Canada, especially as a source of new regular givers, as part of diversified acquisition program.

Since 2017, we have progressively scaled up the media spend on DRTV. We are currently running spots over a set of core English language stations and are periodically testing French language stations. We primarily purchase off-peak, pre-emptable media and try to purchase spots months in advance to maximize availabilities.

Response to the DTRV program is captured through a unique landing page and through spot attribution across our website. Spot attribution is facilitated by analytics software, Adalyser. Overall, approximately 20-40% of all gifts are made directly through web gifts. We no longer have a call centre that handles inbound calls. Alongside our DRTV program, we run digital retargeting ads to try and maximize response, as well as CTV (Connect TV).

1.2 Statement of Purpose & Objectives

PSP Canada is looking for the establishment of Frame Agreement with a TV media buying agency to support in the purchase of media across stations in Canada, to:

- Air spots which procure for UNHCR regular and one-time gift donors at a positive ROI (return on investment);
- Maximize cost efficiencies (cost per spot and cost-per-thousand) and deliver converted response at the lowest possible cost;
- Develop test matrices (time-length, ask amount, response mechanism) to optimize the performance of the program;
- Recommend a media spend plan that helps us grow a set of core stations through thoughtful station testing.

The agency's goal is to develop, implement, execute, test, and optimize the most effective media-buying strategy in order to achieve the greatest possible impact for a given fundraising budget.

Overall PSP Canada expects from the company to deliver on or exceed annual budget goals whilst maximizing ROI.

The Frame Agreement will be signed with the successful bidder(s) for a period of three (3) year with the possibility of further extension for two (2) additional periods of one (1) year each:

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Phase 1: 1st of January 2025 – 31st of December 2025

Phase 2: 1st of January 2026 – 31st of December 2026

Phase 3: 1st of January 2027 – 31st of December 2027

Phase 4: 1st of January 2028 – 31st of December 2028

Phase 5: 1st of January 2029 – 31st of December 2029

The successful bidder(s) will be requested to maintain their quoted price model for the duration of the contract.

To indicate the volume of the work in terms of media implementation services, please find hereunder PSP Canada projected media spend; please note that the below budget cannot be considered as commitment:

- 2025: \$750,000
- 2026: \$800,000
- 2027: \$850,000
- 2028: \$900,000
- 2029: \$1,000,000

To indicate the volume in terms of account management services, please find hereunder PSP Canada estimation in terms of hours spent on the project; from year 2 onwards an +5% contingency buffer is added. Please note that the below budget cannot be considered as commitment:

- 2025: 60 hours
- 2026: 63 hours
- 2027: 66 hours
- 2028: 69 hours
- 2029: 73 hours

These budgets are subject to the performance we can achieve. There is capacity to grow the program if performance exceeds projections. In the past few years, we have spent over \$1M in media spend each year but have scaled to do performance. We no longer run an always-on strategy but are open to doing so again in the future. The budget is inclusive of all fees to the media agency but exclusive of fees paid towards creative production, response handling, production, dubs, and detailed reporting.

Performance is primarily measured through ROI. Minimum performance levels are indicated as following:

ROI should be at least 0.7 at 12 months, 2.1 at 36 months, (inclusive of all program costs) for all years.

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. In addition, the agencies are also required to present their overall strategy for delivering innovative media-buying strategies. Agencies should also provide a **minimum threshold** is applicable, for monthly and annual media spend in the case that you do not take projects below a certain spending threshold.

Additional note: The budget allocated may vary and is subject to UNHCR's confirmation. Each year, the budget will be confirmed through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

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

To be eligible to participate at this bidding, your company **must have a local office in Canada** and your company must be authorized to work / do business in Canada. To establish compliance with these criteria please:

- Send the Copy of Certificate of Business Registration/ Certificate of Incorporation*
- Fill in the Vendor registration (Annex C)*

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

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1.4 Joint venture, subcontracting

Please be informed that joint venture, or contractor/subcontractor relationships are allowed. In either case, the bidder needs to confirm which company is the project lead to take responsibility for 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.

Please refer to UNHCR general terms and conditions clause 5, Subcontracting:

If the Contractor requires the services of subcontractors to perform any obligations under the Contract, the Contractor shall obtain the prior written approval of UNHCR. UNHCR shall be entitled, in its sole discretion, to review the qualifications of any subcontractors and to reject any proposed subcontractor that UNHCR reasonably considers is not qualified to perform obligations under the Contract. UNHCR shall have the right to require any subcontractor's removal from UNHCR premises without having to give any justification therefor. Any such rejection or request for removal shall not, in and of itself, entitle the Contractor to claim any delays in the performance, or to assert any excuses for the non-performance, of any of its obligations under the Contract, and the Contractor shall be solely responsible for all services and obligations performed by its subcontractors. The terms of any subcontract shall be subject to and shall be construed in a manner that is fully in accordance with, all the terms and conditions of the Contract.

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2 Requirements

2.1 Strategic media planning

- Provide overall account management, including a dedicated account manager and team.
- Collaborate with DTV to develop an annual media plan (with monthly iterations) which considers past testing and learnings and accounts for testing to develop new learnings to further optimize the program.
- Provide ongoing strategic advice, optimization and media planning based on results; constantly optimize for the best possible CPA/ROI and adjust media plan accordingly.
- Budgets are determined in November of each year for the period of March–February in the subsequent year.
- Please thoroughly describe your approach to researching and planning media spends, considering past-performance, station testing, tactical testing (time-length, price-point, and voice-over) and creative testing.
- Please indicate the various steps you would take over the course of a year in planning e.g. initial annual planning and ongoing revisions based on results.
- Please share samples as below and explain each sample in terms of how they fit into the requirements above.
 - One (1) sample media plan
 - One (1) sample testing plan
- Please indicate Canadian English and French campaign experience. Please indicate key differences you see between both markets and any variances in strategy you typically employ to account for these differences.
- Inter-agency partnership: with most Direct Marketing channels, effective media buying and planning alone will not guarantee success. Please outline how you would work with UNHCR and their other agencies, e.g. creative agency, etc. to create a high performing inter-agency partnership.
- Competitor activity and Canadian landscape: Please outline how your agency would keep UNHCR informed of competitor activity and assess any potential impact on our DRTV marketing strategy. Additionally, if you work with organizations that may be considered competitors of UNHCR, explain how you manage these relationships within your agency. It is essential that your team has in-depth knowledge of the Canadian TV buying landscape and can provide expert advice and updates regularly.

2.2 Media planning, buying, implementation and management

- Manage all aspects of the paid TV media campaign including TV ad distribution, broadcast verification, delivery confirmation
- Please outline your approach to buying airtime in terms of any deals that you may have in place or preferred relationships with any networks and how these may benefit UNHCR. Please outline the network types / groups you buy for your clients. Please indicate the number of networks you have worked with in the past year.

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- We currently only buy linear TV media. We are looking to further test into CTV (Connected TV) advertising in the future. Please provide information about your firm's capacity and experience in this area or other non-linear media buying capabilities.
- Please outline whether your company guarantees placement of spots and indicate the recommended guaranteed placement. We currently primarily buy pre-emptable media but are open to testing non-preemptable spots if the ROI is positive. Please explain your firm's experience with both pre-emptable and non-preemptable media buying.
- Note that due to frequent sell-outs, we tend to buy pre-emptable media, as early as possible maximising or even surpassing our allocated budget. We then cancel purchases prior to the airing date, prior to a penalty being incurred for cancellation, if results indicate that the spot purchased is not optimal and to take us within our budget threshold. This helps us avoid situations of sell-outs on our preferred situations. Please explain your firm's experience and strategies employed to avoid sell-out situations on preferred stations.
- Broadcast Approval: please provide details of how far in advance approval for campaign activity and sign off for media plans would be needed.
- Please indicate any experience you have in securing benefits for your non-profit clients e.g. bonus airtime, PSAs etc. Note that UNHCR Canada is not a charitable entity, we are qualified donee under CRA rules.

2.3 Reporting and analysis

- Provide weekly time-stamped consolidated data file formatted correctly and uploaded directly to the Adalyser platform.
- On a weekly basis, we require that you provide a time-stamped consolidated data file. This consists of a list of every spot which has aired, its date and time, station creative etc. and the consolidated audience figures for each spot.
- Participate in bi-weekly status calls and monthly review meetings.
- All DRTV partners participate in planning meetings assessing the health of the overall program, new avenues for expansion and growth, providing in-depth analysis of activities.
- You will also be required to report on all final media costs for the previous month.
- Reporting is consolidated and prepared by our agency DTV including consolidation of response data. This is shared bi-weekly and a final monthly report approximately 3 weeks after the end of the month.
- A monthly all partner meeting is held to review the results of previous wave and inform results from testing and suggested revisions to the media plan.

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.

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2.5 Compliance with the Government Requirement

The vendor shall comply with all applicable laws, statues, ordinances, codes, rules, regulations and lawful orders of all governmental, public, and quasi-public authorities and agencies having jurisdiction over the project.

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3 Content of your offer

IMPORTANT: You must prepare a technical and financial proposal separately to allow the two steps evaluation. No financial information can be included in the technical proposal as that would lead to disqualification.

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 *experience in the private (i.e. for profit) and in the non-profit sector*.

(1) TV media buying service provision experience in the DRTV sector:

Please provide list of similar projects/clients from the past 5 years.

(2) DRTV experience in the non-profit sector:

Please provide list of similar projects/clients from the past 5 years.

UNHCR is committed to making a positive contribution to the environment and society whilst also meeting its organizational needs when purchasing goods and services. Therefore, the supplier should take environmental, social, and economic aspects into account when providing these services.

The Organization should demonstrate their commitment or efforts to integrate and implement sustainable practices during the contract implementation.

3.2 Proposed services

During the technical evaluation, in this section, the panel will *your company`s compliance* regarding the required services listed under section 2 (requirements). Your proposal is to be tailored as per requirements and information requested under different points of section 2, to ease the evaluation process. General company profile will not be accepted. Describe your strategy to deliver on or exceed on annual budgets whilst maximizing ROI.

Please explain any innovative suggestion your company has, in terms of campaigns, reporting, spot purchasing (including non-linear TV media purchasing) or any other strategy aimed to acquire quality, long-term committed high life-time value donors and reduce the attrition rate through our media buying strategy.

3.3 Account management

Account management is crucial for running a successful DRTV campaign. This section is dedicated to measure the proposed customer service towards PSP Canada 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 provide short biographies of core staff who will be working on the account with a clear indication of the number of years of relevant work experience they have. Please also provide a description of what their role will be on the account and their level of involvement in the account.

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

3.4 Content of Your Financial Proposal

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

Media planning, buying, implementation and managing will be paid based on media commission fee as per proposed media budget ranges. Please indicate a fixed % to be charged

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Account management and reporting services will be paid based on hourly rate. Please add a fix hourly rate for each phase for these services.

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4 Technical and financial evaluation

Only offers compliant with this Yes or No criteria will be considered for evaluation, please refer to section 1.3.

The evaluation will be carried out separately on technical and financial level. We use a 100 points scale and allocate 70% (i.e. 70 points) for the technical and 30% (i.e. 30 points) to the financial component.

The minimum passing score of the evaluation is 42 out of 70; if a bid does not meet these minimums, it will be deemed technically non-compliant and will not proceed to the financial evaluation.

4.1 Technical evaluation

Company Qualifications (max 15 points)	Documents, information to be provided to establish compliance with the set criteria
TV media buying service provision experience in the DRTV sector (7.5 points)	<p>Please provide list of similar projects with clients from the past 5 years.</p> <p>The scores will be allocated for the number clients in DRTV media-buying experience, based on the evidence provided.</p>
DRTV experience in the non-profit/charity sector (5 points)	<p>Please provide list of similar projects with clients from the past 5 years.</p> <p>The scores will be allocated for the number of clients in DRTV media-buying within the non-profit/charity sector, based on the evidence provided.</p>
Demonstrated commitment or efforts to integrate and implement sustainable practices in the company's current operations (max 2.5 points)	<p>The organization demonstrate ability to integrate and implement sustainability measures in the execution of the contract including but not limited to:</p> <ol style="list-style-type: none"> The bidder shall provide a description of the company's commitment to reduce the environmental impact of their operations (half A4 page or 1-2 slides) The bidder demonstrates gender-balanced project team (i.e. practices, policies, or initiatives) The bidder demonstrates commitment with disability inclusion in their operations (i.e. disability inclusion policy, practices, or quota). Other sustainable practices
Proposed Services (max 45 points)	Documents, information to be provided to establish compliance with the set criteria
Strategic media planning (20 points)	<p>Comprehensive proposal to be presented including all services listed under point 2.1.</p> <p>Please explain any innovative suggestion your company has, in terms of campaigns, reporting, spot purchasing (including non-linear TV media purchasing) or any other strategy aimed to acquire quality, long-term committed high life-time value donors and reduce the attrition rate</p>

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	<p>through our media buying strategy.</p> <p>To better support your technical proposal, please include into this section one (1) sample media plan and one (1) sample testing plan.</p> <p>The scores will be allocated based on the quality and clarity of the proposed strategy and proven added value to UNHCR work.</p>
Media planning, buying, implementation and management (15 points)	<p>Comprehensive proposal to be presented including all services listed under point 2.2.</p> <p>The scores will be allocated based on the quality and clarity of the proposed strategy and proven added value to UNHCR work.</p>
Reporting and Analysis (10 points)	<p>Comprehensive proposal to be presented including all services listed under point 2.3.</p> <p>To better support your technical proposal, please add one time-stamped consolidated data file.</p> <p>The scores will be allocated based on the quality and clarity of the proposed strategy and proven added value to UNHCR work.</p>
Account management (max 10 points)	<p>Documents, information to be provided to establish compliance with the set criteria</p>
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	<p>The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.</p> <p>Please provide short biographies of core staff who will be working on the account with a clear indication of the number of years of relevant work experience they have. Please also provide a description of what their role will be on the account and their level of involvement in the account.</p> <p>Please make sure you elaborate on this section properly, to understand the level of support proposed for managing our account.</p>

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 (media buying and any additional fees) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

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5 Customer responsibilities

PSP Canada will be responsible for:

- Appointing a dedicated project manager;
- Providing information and content about UNHCR's mission and activities;
- Providing creative materials;
- Provisioning response mechanisms (web and mobile) with testing parameters (vanity urls) as requested 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.

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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;
- Cost per donor;
- Ratio of monthly donors acquired versus one-time gift donors;
- ROI on media spend;
- Cost per spot;
- Cost per thousand;
- Response Rate