



ANNEX A: TERMS OF REFERENCE
RFP/24/029/France/PSP
REQUEST FOR PROPOSAL FOR THE PROVISION OF DIRECT MAILING CAMPAIGN SERVICES
FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN FRANCE

DIRECT MAILING CAMPAIGN SERVICES FRANCE
Terms of Reference

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org by the 10th of January 2025 (23:59 OM CET).

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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 several 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. Their staffs of more than 20,000 personnel are helping millions of people in 135 countries. For more information, please see www.unhcr.org

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

To achieve longer-term income goals, PSP France is now seeking for high-qualified creation/production agencies to support the Organization in conceiving and producing Direct mailing campaigns.

1.2 Statement of Purpose & Objectives

PSP France would like to identify qualified companies for the provision of direct marketing campaign services.

PSP France would like to establish a frame agreement with two qualified service providers (primary and back-up provider) to support UNHCR in developing and managing an offline direct marketing program to recruit and retain quality donors, with a specific focus on donor acquisition, to:

- Increase donations both one-off and regular.
- Improve donor cultivation and long-term value.
- Collaborate with UNHCR France other agencies (digital for instance) to participate to a 360-donor journey.

The service providers' 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 France expects from the company to maximize ROI (see ROI expectations below).

The proposed frame agreement will start from May 2025 (tentatively) for 12-month, with possible extensions of further period of two times 12-months:

- May 2025 – April 2026
- May 2026 – April 2027
- May 2027 – April 2028

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1.3 Objectives

- We are anticipating the following activities for each year (please note that the below is our estimated volumes based on the current donor file, and on our future estimated volumes considering our growth objectives):
 - **1 to 3 donor acquisition (cold) mailings** per year using list rentals, lapsed file and potential alternate acquisition devices for an estimated volume of 50,000 to 200,000 pieces per mailing.
 - **5 to 7 donor development (warm) mailings** per year for a total volume of approximately 5,000 to 50,000 pieces per mailing which could include (and/or):
 - 1 emergency appeal for an Individual Giving target to be defined,
 - 1 reactivation mailing for lapsed donors,
 - Magazine, postcard, inserts, and any other retention mailings.
 - **1 to 3 special appeals for the mid-value segment** (cumulative €2000-€9999 in previous 12 months)

Volumes of the current donors file:

High value donors - > €10 000 in previous 12 months (cumulative)	25
Middle value donors - cumulative €2000-€9999 in previous 12 months	250
Active Regular Donors	9 000
First gift Donors - 0-12 months	3 500
First gift Donors - 0-24 months	5 000
First gift Donors - 24-36 months	19 000
First gift Donors - 36-48 months	1 600
First gift Donors - 48-72 months	2 500
Loyal Donors - 0-12 months	5 700
Loyal Donors - 0-24 months	3 800
Loyal Donors - 24-48 months	3 000
Loyal Donors - 48-72 months	700
Leads 0-12 months with postal address	1 000

The selected agencies are required to manage and implement direct mail activities to help achieve the following objectives:

Priority:

- ROI of 0,7 for acquisition and minimum ROI of 2 for retention.
- Recruitment of new One-off giving donors to significantly increase the database apart from the emergencies context.
- Consolidate and build loyalty among emergency donors.

Secondary:

- Recruitment of high-value donors (cumulative 2000€-9999€ in previous 12 months)
- Reactivate donors who have not given for more than 24 months.
- Increase the number of One-off to Regular donor's conversions.

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- Increase the contribution and improve the retention of RG donors, especially those recruited from street marketing.
- Other objectives to be defined if needed.

Interested companies are 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 Direct Marketing services.

1.4 Pre-selection criteria

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.

Pre-selection criteria	Documents, information to be provided to establish compliance with the set criteria
Your company must be registered and eligible to do business	To establish compliance with these criteria: <ul style="list-style-type: none">• Copy of Certificate of Business Registration/ Certificate of Incorporation is to be sent*• Vendor registration form to be filled out and submitted (Annex C)*
Compliance with UNHCR general terms and conditions	Acknowledge UNHCR general terms and conditions in its entirety, please add to the last page: <ul style="list-style-type: none">• your company name• representant name• date• signature to all pages of Annex D and send along with your proposal.
Compliance with UNHCR Special Data Protection Conditions	Acknowledge the Supplementary Agreement on protection of personal data, including UNHCR special data protection conditions, in its entirety, please: <ul style="list-style-type: none">• add your company name• representant name• date• signature to all pages of Annex E and send along with your proposal. This agreement will be tailored made and signed with the selected company, as part of the frame agreement.

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

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1.5 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

The following services are to be provided under the direct marketing project:

- Global direct marketing strategy (for acquisition and donor development) and reporting;
- Media buying implementation, management and reporting;
- Creative development;
- Production, assembly, and shipment of the material created.

2.1 *Global direct marketing strategy (for acquisition and donor development) and reporting*

- Provide recommendations on how to reach the objectives while meeting the annual financial budget and providing an annual fundraising plan including:
 - An overall strategic advice to recruit new individual donors and increase overall revenue through direct mail with the support of other channels (if needed).
 - Strategic advice on ask strategy and technics to increase response rate and average gift amount.
 - Strategic advice for welcome program for newly recruited monthly and newly recruited one-off donors including second gift, monthly conversion, and retention strategies.
 - Strategic advice on the development of middle level donor program (2000€ to 9999€ cumulative in last 12 months) including second gift, monthly conversion, and retention strategies.
 - Strategic advice on donors and leads segmentation.
 - Strategic advice on fundraising-oriented and awareness-raising-oriented mailings.
 - Recommendation of innovation(s) that could disrupt UNHCR DM campaign (ex: mailing format, goodies, content, strategic approach, etc.)
- Project management: develop and manage planning and to-do lists for each campaign to ensure key milestones and mail drop deadlines are met.
- Manage relations with all third-party supplier (including accountability).
- Provide proof of GDPR compliance related to data sharing.
- In case of an UNHCR emergency, provide specific recommendations and processes to be efficient as quickly as possible.
- Weekly updates on the progress of campaigns, monthly budget versus actual results, a monthly report on campaign performance with recommendations, an analysis of each mailing post-mail drop, a monthly summary report of all testing carried out, if applicable.
- Overall account management.
- Develop a direct mail program for the Monaco's market if applicable.

2.2 *Media buying implementation, management, and reporting*

- Provide strategic advice on global prospects targeting to acquire new individual donors through DM appeal, including strategic advice on list rental or acquisition.
- Ensure rented lists are clean: files must be checked to remove opt outs and deceased persons, updated postal addresses, de-duplication with our database.

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- Choose and manage lists suppliers and negotiate with them the best quality and price.
- Manage the relations with list rental providers (including accountability).
- Provide data selection expertise including initial draft of data selection briefs, working closely with UNHCR to finalize individual appeal data selection extractions.
- Adjust targeting and list rental strategy according to previous results.
- Provide scoring expertise and providers to maximize the UNHCR database donors response and the acquisition lists rental.

2.3 *Concept and creative development, including creative concepts, research, copywriting, and creative design for standard direct mail appeal package*

- Provide graphic and copywriting proposals for the DM appeals considering they are part of a multichannel campaign.
- Development of compelling creative concepts per appeal, research, copywriting, and creative design and innovative ideas.
- Optionally, develop High-Value Donors adaptations of the mailing.
Note: in some cases, creative is adapted from packs developed by UNHCR HQ or other country offices, or from previously UNHCR France materials.

2.4 *Print, Production, Assembly and Shipment*

- Provide production management and implementation including printing direct marketing materials, postage, and delivery of all packages.
- Develop and manage planning and worklist for each campaign to ensure key milestones and mail drop deadlines are met.
- Provide strategic advice on mailing format (and innovative ideas), printing (and ability to up-scale printing), material, etc. to optimize cost per unit to ensure the best possible ROI.
- Manage the relations with all providers (including accountability).
It should be noted that, as part of the contract, the selected agency will have to submit bids from at least 2 different service providers for each production.

Please find attached the following documents to help you preparing your proposal:

- Annex I - UNHCR_Brand_Book
- Annex J UNHCR France EOY acquisition DM
- Annex K Example of a UNHCR DM annual plan - extract

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3 Content of the Technical Offer

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 to use for your technical proposal, you can submit any type of documents.

GENERAL COMPANY PROFILE WILL NOT BE ACCEPTED. PLEASE TAILOR YOUR PROPOSAL AS PER REQUIREMENTS ON THIS TERMS OF REFERENCE UNDER SECTION 2.

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. In case pricing or any financial details are added to the technical proposal, the proposal will be disqualified.

You can fill in Annex H Technical proposal check list to make sure you submit all requested documents and information in your proposal. Please note that Annex H is NOT your technical offer, it is only a checklist. Please prepare a detailed technical proposal.

3.1 Company Qualifications

During the technical evaluation, in this section, the panel will score your company's relevant experience in the for-profit and in the non-profit sector and demonstrated commitment or efforts to integrate and implement sustainable practices in the company's current operations:

(1) Service provision experience in the for-profit sector:

- Please let us know the total number of for-profit clients from the past 5-4 years, for direct marketing mailing projects.

(2) Service provision experience in the non-profit sector (charity):

- Please let us know the total number of non-profit clients from the past 5-4 years to acquire new donors and retain existing donors through direct mail in similar fields of activity (humanitarian aid/emergency relief/international solidarity).

Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection for new companies, as part of the background check/due diligence.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) your company's compliance and capacity regarding the required services listed under point 2; and (2) your company's capacity and strategy to achieve the proposed results and improve them. Please consider the below points when working on your technical offer:

- Please prepare three-year action plan to achieve the objectives listed in section 1.3, with a proposal (via a summary document) including mailing volumes, mailing themes and objectives.

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- Please suggest of a worklist that our operational team would work on with yours on a day-to-day basis.
- Your full recommendation on lists rentals, including a sample targeting recommendation with justification of your segments and lists choices. This recommendation should include an estimation of results per list rental (**not in terms of costs -which will be developed in the financial offer-**, but in terms of response rates and average gifts).
- Please provide the creative design of an acquisition mailing that would maximize ROI for UNHCR (you may pick UNHCR pictures from the image bank, using low-resolution pictures: <https://media.unhcr.org/>)
- In case of emergency, tell us how you propose to be ready for the emergency, where very fast production and implementation is required in pressing timings:
 - Which strategies and processes do you propose?
 - Please propose a draft of an effective retro-planning in case of an emergency campaign (from creative development to postage)It should be noted that agencies will undertake to respect the deadline for deployment of an emergency mailing proposed in their bid, following contractualization.
- If applicable, provide examples of direct mail Monaco's programs you have implemented for previous or current clients (optional).
- Please include a standard delivery time for services provided.
- Commitment to sustainability: Proven track record of reducing environmental footprint of mailings for example through carbon offsets, sourcing environmentally friendly products or reducing energy usage in production. Please Submit your environmental policy.

Please send the following samples/examples:

- At least three (3) samples of successful creative pieces (printed materials) of End of year/Detax direct mailings your company has achieved, preferably for clients with similar fields of activity (humanitarian aid/emergency relief/international solidarity).
- One (1) creative design of an acquisition mailing for UNHCR.
- One (1) list on rentals, including a data brief and a sample targeting recommendation with justification of your segments and lists choices. This recommendation should include an estimation of results per list rental (not in terms of costs -which will be developed in the financial offer-, but in terms of response rates and average gifts)

3.3 Account management

Account management is crucial for running a successful direct marketing program. This section is dedicated to measure the proposed customer service towards PSP France team. Your company must offer the adequately skilled staff to ensure compliance with PSP France requirements in terms of creative production, quantities, and deadlines.

PSP France requires an account management team of at least 2 staff members as per following:

- Customer service and creative production: to creative content creation, to provide support day-to-day, to participate at in person or online meetings on status reports, campaigns reviews.
- Production: staff assigned to printed production of the campaign materials.

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During the technical evaluation, in this section, the panel will score the experience of the two-core people who will work on UNHCR project (based on the number of years and demonstration expertise in the area). Please add a short CV (max half A4 page) outlining the relevant experiences.

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4 Evaluation

4.1 Technical Evaluation

Only offers compliant with this Yes or No criteria will be considered for evaluation Please refer to section 1.4.

The technical offers will be evaluated using inter alia the following criteria and percentage distribution: **60 %** from the total score (on a 100 points scale, i.e. max 60 points obtainable for the technical offer). Please find the detailed scoring breakdown.

Company Qualifications (max 10 points)	Documents, information to be provided to establish compliance with the set criteria
Service provision experience in the for-profit sector (2.5 points)	The scores will be allocated for the number of clients listed. Please let us know the total number of for-profit clients from the past 5-4 years, for direct marketing mailing projects.
Service provision experience in the non-profit sector (charity) (5 points)	The scores will be allocated for the number of clients listed. Please let us know the total number of non-profit clients from the past 5-4 years to acquire new donors and retain existing donors through direct mail in similar fields of activity (humanitarian aid/emergency relief/international solidarity).
Demonstrated commitment or efforts to integrate and implement sustainable practices in the company's current operations (max 2.5 points)	The organization demonstrate ability to integrate and implement sustainability measures in the execution of the contract including but not limited to: a. 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) b. The bidder demonstrates gender-balanced project team (i.e. practices, policies, or initiatives) c. The bidder demonstrates commitment with disability inclusion in their operations (i.e. disability inclusion policy, practices, or quota). d. Other sustainable practices
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Global direct marketing strategy (for acquisition and donor development) and reporting (20 points)	A detailed section on the technical proposal to prove your company's compliance with requirements listed under section 2.1, including:

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	<ul style="list-style-type: none"> • Please prepare three-year action plan to achieve the objectives listed in section 1.3, with a proposal (via a summary document) including mailing volumes, mailing themes and objectives. • Please suggest a worklist that our operational team would work on with yours on a day-to-day basis. • In case of emergency, tell us how you propose to be ready for the emergency, where very fast production and implementation is required in pressing timings: • Which strategies and processes do you propose? • Please propose a draft of an effective retro-planning in case of an emergency campaign (from creative development to postage) • It should be noted that agencies will undertake to respect the deadline for deployment of an emergency mailing proposed in their bid, following contractualization. • If applicable, provide examples of direct mail Monaco's programs you have implemented for previous or current clients (optional). • Please include a standard delivery time for services provided. <p>The scores will be allocated for the comprehensiveness and added-value approach.</p>
Media buying implementation, management, and reporting (5 points)	<p>A detailed section on the technical proposal to demonstrate capacity to prove your company's compliance with requirements listed under section 2.2, including:</p> <ul style="list-style-type: none"> • One (1) list on rentals, including a data brief and a sample targeting recommendation with justification of your segments and lists choices. This recommendation should include an estimation of results per list rental (not in terms of costs -which will be developed in the financial offer-, but in terms of response rates and average gifts). <p>The scores will be allocated for the comprehensiveness and added-value approach and based on the quality of the requested sample/report.</p>
Concept and creative development, including creative concepts, research, copywriting, and creative design for standard	<p>A detailed section on the technical proposal to prove your company's compliance with requirements listed under 2.3, including:</p> <ul style="list-style-type: none"> • One (1) creative design of an acquisition mailing that would maximize ROI for UNHCR (you may

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direct mail appeal package (10 points)	<p>pick UNHCR pictures from the image bank, using low-resolution pictures: https://media.unhcr.org/)</p> <ul style="list-style-type: none"> • Three (3) samples of successful creative pieces (printed materials) <p>The scores will be allocated for the comprehensiveness and added-value approach and based on the quality of the requested sample/report.</p>
Print, Production, Assembly and Shipment (5 points)	<p>Please describe the proposed management and implementation including printing direct marketing materials, postage, and delivery of all packages. Please add information about the production/manufacturing team composition.</p> <p>The scores will be allocated for the comprehensiveness and added-value approach.</p>
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	<p>PSP France requires an account management team of at least 2 staff members to cover for the following responsibilities, for more info please refer to section 3.3:</p> <ul style="list-style-type: none"> • Customer service and creative production • Production: <p>Please add a short (max half A4 page) CV to the technical proposal to outline the number of relevant experiences of the proposed staff. The scores will be allocated based on the average years of relevant experience.</p>

The minimum passing score of the evaluation is 35 out of 60; 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 40 % (of the total scores), i.e. max 40 points. The financial proposal is to be submitted ONLY by filling in Annex B. No other format will be accepted.

The maximum number of points will be allotted to the lowest price offer that is opened 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

- Access to UNHCR content and brand guidelines (e.g. media library and data) for the elaboration of campaigns.
- Information, documents, materials, and assistance reasonably necessary to enable the Direct Mail agencies to learn about UNHCR's mission, vision, and purpose.
- Stories, content, program information, program briefs, existing assets and materials and images/videos necessary to enable the Direct Mail agencies to develop creative materials for fundraising purposes in France.
- Previous analysis, results data, and insights to enable the Direct Mail agencies to develop a strategy to target and develop a segmentation strategy for fundraising purposes in France.
- Previous testing strategies and results to enable the Direct Mail agencies to determine and plan future tests for fundraising purposes in France.
- Appeal management report, detailing appeal performance against UNHCR France metrics to be supplied for analysis following completion of the campaign.