

Annex A: Terms of Reference
2016/HCR/HKG/RFP/10040
COMMUNICATIONS, ENGAGEMENT AND PRODUCTION SERVICES IN
HONG KONG SPECIAL ADMINISTRATIVE REGION (Hong Kong SAR) AND
MACAO SPECIAL ADMINISTRATIVE REGION (Macao SAR) OF CHINA

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

Table of Contents

1	Introduction.....	3
1.1	Background	3
1.2	Statement of Purpose & Objectives.....	3
2	Requirements.....	5
2.1	Core requirement.....	5
2.2	Customer Responsibilities	17
3	Content of the Technical Offer	18
3.1	Company Qualifications.....	18
3.2	Proposed Services	18
3.3	Personnel Qualifications.....	19
3.4	Vendor Registration Form	19
3.5	Applicable General Conditions	19
4	Evaluation	20
4.1	Technical Evaluation	20
5	Key Performance Indicators	21
5.1	Performance Evaluation	21

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR), the UN Refugee Agency, leads international action to protect people forced to flee their homes because of conflict and persecution. We deliver life-saving assistance like shelter, food and water, help safeguard fundamental human rights, and develop solutions that ensure people have a safe place to call home where they can build a better future. We also work to ensure that stateless people are granted a nationality.

First marked in 2001, World Refugee Day is held every year on June 20. Tens of thousands of people around the world take time to recognize and applaud the contribution of forcibly displaced people throughout the world. The annual commemoration is marked by a variety of events in more than 100 countries. In Hong Kong, the UNHCR Sub-Office Hong Kong has been organizing the annual UNHCR Charity Refugee Film Festival every June since 2008. 2017 will see the 10th anniversary of the Festival.

The office is now opening this Request for Proposal (RFP) for the Provision of Communications, Engagement and Production Services in Hong Kong and Macao SARs that consist of:

- I. Multichannel Shelter campaign
- II. Ongoing public engagement (online)
- III. (a) Ongoing digital Facebook advertising and (b) Generic lead generation programs

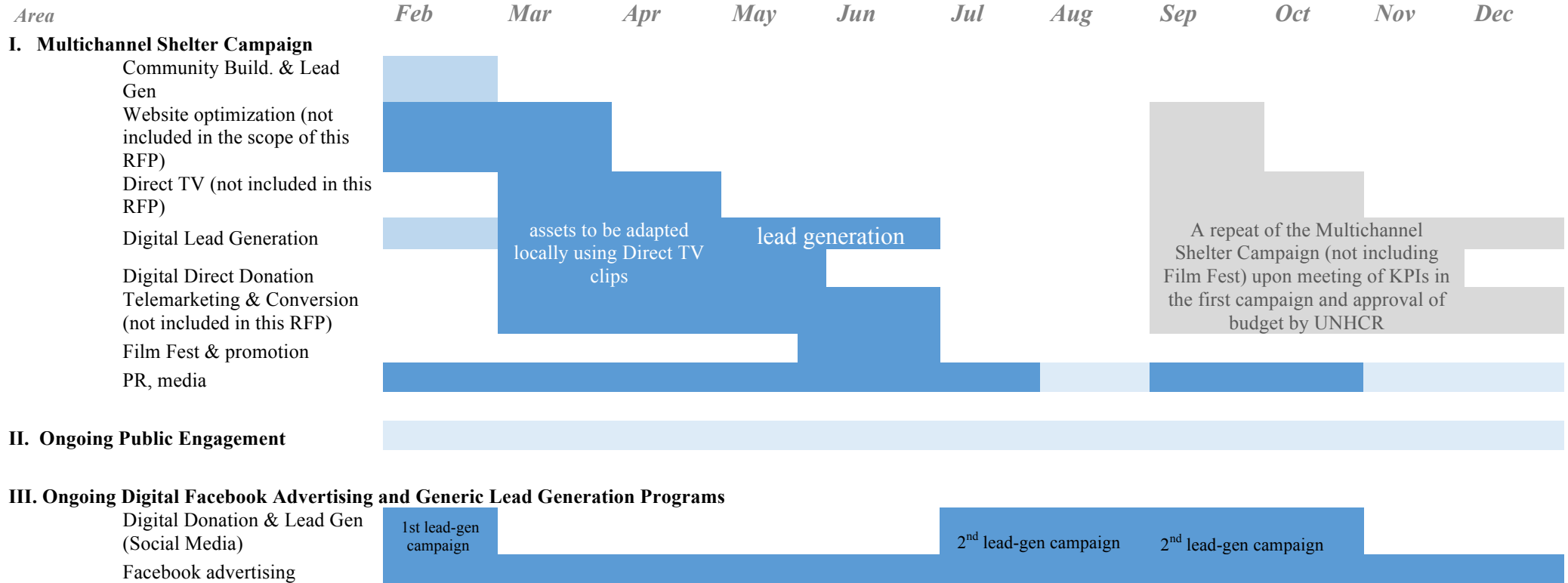
UNHCR expects the winner(s) of this RFP to be able to provide the service from mid-February 2017 until 31 December, 2017, with the possibility to further extend the contract for two additional years.

1.2 Statement of Purpose & Objectives

- I. **Multichannel Shelter Campaign:** To enhance awareness and support for the UNHCR and its global work, specifically with the theme around Shelter / Nobody Left Outside. To attract direct donations (both regular giving and one-off) from Hong Kong and Macao and to generate leads of new donors. With Direct TV as a key component, and the UNHCR Charity Refugee Film Festival as a milestone, this campaign should use and integrate various online and offline channels. Strategies should include digital, public relations, media relations, offline promotion, celebrity/KOLs, possibly events, and others as appropriate. Assets with the theme will be available from UNHCR Headquarter. Vendors are welcome to create further assets to maximize impact if needed. (2.1.1)
- II. **Ongoing Public Engagement (Online):** Apart from the above campaign, UNHCR seeks to engage the general public and target audience, both online and offline as an ongoing basis (with spikes if appropriate.) (2.1.2)
- III. **(a) Ongoing Digital Facebook Advertising and (b) Generic Lead Generation programs:** Mini online initiatives to attract donations and generate leads of new donors (2.1.3)

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

*Implementation Timeline
 (tentative)*



Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

2 Requirements

2.1 Core requirement

Service period: Mid-February 2017 – December 31, 2017, with the possibility to extend the contract for two additional years.

2.1.1 Multichannel Shelter Campaign (assuming two campaigns per year)

Number of campaigns per year subject to (1) performance of the first campaign and (2) UNHCR's final decision

To analyse, recommend and execute strategies to achieve the objectives specified above. These strategies should cover multi-channels including both online/digital and offline, and include but not limit to the following list. (Assets available from UNHCR Headquarter: Direct TV footage, videos, infographics, social media assets, emails, etc.)

(Please note external marketing/public relations/media collateral is required to be bilingual – English and Traditional Chinese - in general, unless otherwise stated.)

I. Overall

- Overall account management including a dedicated account team
- Phone meeting once a week and in-depth meeting on a monthly basis
- Development of media plan
- Development of key visuals for campaign
- Development of creative testing plan
- Management of all aspects of campaigns
- Detailed weekly report and analytics; including monitoring of overall ROI and other key metrics
- Strategic planning and advice based on results

II. Digital / Social Media – Direct Donation and Leads Generation

- Campaign proposal and planning
- Develop key visual for the campaign, based on UNHCR's assets
- Messages and copies
- Develop key messages
- Copies development
- Copies editing (Please specify as optional items)
- Video adaptation/editing/post-production (Please specify as optional items)
- Testing and optimization
- Media buy (Please specify as optional items)

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Online campaign management and reporting

Please note, any materials/drafts/edits by vendor should be accurate and proofread by vendor before submission.

UNHCR Parameters / Considerations:

UNHCR offers the following expected parameters to be considered when preparing your proposals. When preparing for your proposals, please tabulate the KPIs you would suggest, provide the estimated values and illustrate how they will be delivered.

Minimum targets per campaign:

- Direct online donation
- Regular giving
 - Number of successful donors: 403
 - Average regular gift: HK\$156.00/month
- One-off giving
 - Number of successful donors: 403
 - Average regular gift: HK\$1,419.00
- Leads generation (quality leads i.e. those with high potential to be converted into donors, with phone number and email address, opted-in)
 - Number of leads: 6,000

III. Public Relations, Media Relations and other Publicity

- General: To increase UNHCR's brand awareness, media coverages and share of voice in the local market, by analysis, recommend and execute strategies of communications, marketing, public relations and media for the entire year.
- Program-specific: To support the Multichannel Shelter Campaign, including to support the Nobody Left Outside Campaign, the World Refugee Day and the Refugee Film Festival. These publicity strategies should cover online/digital and offline, and include but not limited to the following aspects (Please note, any materials/drafts/edits by vendor should be accurate and proofread by vendor before submission):
 - Offline Media Buy (Please specify as optional items)
 - Develop key visuals based on UNHCR's assets for the campaigns namely, Multichannel Shelter Campaign and UNHCR Charity Refugee Film Festival
 - Message and copies
 - Develop media/ press angles
 - Copies development
 - Copies editing (please specify as optional items)

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Design and development of marketing collaterals: (please specify as optional items)
 - Pamphlets
 - Posters
 - Other Marketing collateral
- Video production (please specify as optional items)
 - Concept development, directing and shooting
 - Editing
 - Post-production
- Media management
 - Identify, prepare and pitch news angles and stories
 - Develop press release and materials
 - Distribute press release and materials
 - Pitch and coordinate media interview opportunities, accompany and support at interviews, follow up to ensure media coverage
 - Tracking, clipping and reporting
- Opening/ Premiere of Refugee Film Festival (please specify as optional items)
 - Event planning, management, coordination and reporting
 - Invite development and production; assist to invite/ register/ confirm
 - Onsite reception (media, VIPS and guests)
 - MC (propose candidates as MC, prepare script, brief and guide MC, coordinate between UNHCR and the MC)
 - Venue set-up, design and production
- Distribution/ placement of marketing materials in outlets such as performance/ cultural/ entertainment venues/ restaurants/ bookshops etc.
 - Recommend list of venues
 - Liaise with venue owners
 - Organise placement
- Joint promotion (media, associations, organizations etc.) (please specify as optional items)
 - Propose a list of organizations for joint promotion
 - Explore and coordinate these joint promotions
 - Track and report results
- Outreach program (please specify as optional items)
 - Propose a list of groups for outreach (e.g. universities, schools and religious groups)
 - Coordinate the outreach programme, track and report results

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Celebrity Engagement (please specify as optional items)
 - Propose and line up one (1) to two (2) celebrities for UNHCR
 - Develop strategy and timeline of celebrity engagement
 - Coordinate, track and report results
- Influencer/ Key Opinion Leader Engagement
 - Please refer to Section (2.1.3–(b)) Both online and offline activities are expected

UNHCR Parameters / Considerations:

UNHCR offers the following expected parameters to be considered, when preparing your proposals. When preparing for your proposals, please tabulate the KPIs you would suggest, provide the estimated values and illustrate how they will be delivered.

Minimum targets of each Multichannel Shelter Campaign:

- Nobody Left Outside Campaign: 10 pieces of coverage on media
- Refugee Film Festival: Ticket sales: HK\$73,500.00
- Refugee Film Festival: 20 pieces of coverage on media
- World Refugee Day: 10 pieces of coverage on media
- Public Relations KPIs
- Media KPIs

2.1.2 Ongoing Public Engagement (Online)

- Overall language(s) & audience criteria:
 - Traditional Chinese and English audiences in Hong Kong and Macau SARs with Traditional Chinese as the priority.
 - Care about social issues, NGOs, causes, refugees, poverty, human rights, charities, children, travels, international, media, and/or other groups agreed by UNHCR.
 - Age 25 years old and above. Other criteria and audience segmentations to be defined after contract awarded.
 - Both donor and non-donors of UNHCR.
 - Utilize lookalike audience segmentations from existing UNHCR subscribers, unsubscribes, active donors, lapsed donors, volunteers, and other lists of audience.
- Objectives:
 - Leverage the digital content from UNHCR and integrate public engagement with paid strategy to boost content and to reach new type of audience.
 - Build empathy of refugee issue.
 - Assist fundraising income, particular in monthly donations as the priority and then one-time donations as secondary.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Incorporate UNHCR communications timeline to maximize the public engagement opportunities.
- 10% growth of the investment on a yearly basis.
- Engagement development and KPIs:
 - Development of public engagement pillar and paid strategy to leverage the digital content and to assist fundraising objectives with reviews and discussion by end of Q2 and Q4 each year.
 - Increase website traffic (sessions) of www.unhcr.org/hk by 30% based on 2016 web average visits, with the same percentage of growth on a year basis, follow by a review and discussion on a monthly basis.
 - Increase ten (10) times on number of Facebook audience reach than the 2016 result with 50% fan growth by end of calendar year, follow by a review and discussion on a monthly basis. The same percentages apply on a yearly basis through both organic and paid integrated strategy.
 - Launch an Instagram account or Instagram business account (when available) that aims to acquire at least 1,500 fans growth by end of first year, follow by a review and discussion on a monthly basis. Then target 50% fan increment on a yearly basis through both organic and paid integrated strategy.
 - Explore and test at least one (1) instant article, one (1) canvas ad or one (1) other new type of content formats on Facebook each quarter from the engagement perspective to maximize the content usage that would benefit the fundraising objectives
- Digital content and creative development:
 - Development of social networks communication pillar and strategy to benefit digital public engagement and to assist fundraising objectives with reviews by the end of Quarter 2 and Quarter 4 each year.
 - Development of social media calendar on a monthly basis. Review and phone discuss with UNHCR on a weekly basis to fine tune the content direction where necessary.
- For Facebook:
 - Produce seven (7) quality timeline posts per week, reply comments, handle crisis management, react emergency appeals, monitor social media discussion to adjust communications angle.
- For Instagram:
 - Produce two (2) to three (3) quality timeline posts per week, reply comments, handle crisis management, react emergency appeals, monitor social media discussion to adjust communications angle.
- Execute the content calendar by:
 - Proofreading for all related promotional materials by the agency before UNHCR approval.
 - Producing daily, one (1) to two (2), social media content such as creation of macros, instant articles, canvas posts, live interviews / broadcast, carousels, infographic, images, or photos with illustration and Photoshop applied to enhance the storytelling.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Localizing one (1) video per month, on average, with editing service i.e. subtitling, script translation, sequence editing, re-packaging for localization, and/or revising call-to-action message to maximize the organization objectives.
- Explore and launch one (1) new free digital channel by Quarter 2 each year with a weekly content maintenance service provided, to sustain and distribute UNHCR digital communications. New channel can be referred to blogs, videos sites, forums, advertorials, or editorials platforms upon approval by UNHCR.
- Guaranteed response time:
 - Social media: reply comments or inbox messages within twelve (12) hours Monday to Friday, and then within one (1) business day on weekends and public holidays.
 - Emergency appeals through social media response and content execution i.e. videos, social media macros and posts, message localization within twenty-four (24) hours.
- Other requirements:
 - Number of emergency is unpredictable as it is based on the opportunity and crisis management decision from UNHCR
 - Optimize content publish time based on GA, insights, or engagement performance reviews to maximize the reach.
- Engagement reporting:
 - Produce social media weekly analysis through email format followed by a monthly review through phone discussion to measure the organic and paid promotions' effectiveness based on number of reaches, post engagements, users' comments, and conversions.
 - Development of comprehensive evaluation upon completion Quarter 2 and Quarter 4 each year within two (2) weeks. Evaluation requirements include but not limited to:
 - PowerPoint or PDF format.
 - Lesson learning to be carried forward into the next lead generation campaign.
 - Qualitative and quantitative analysis.
 - Trends of digital engagement with strategy review on success and failure elements.
- Other requirements:
 - Brand guideline needs to be strictly followed: <http://media.unhcr.org/brand>
 - Apply UTM tracking for each promotion URL to capture result through Google Analytics for promotion analysis.

2.1.3 Ongoing Digital Facebook Advertising and Generic Lead Generation

(a) Ongoing Digital Facebook Advertising

- Language(s) & audience criteria:

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Traditional Chinese and English audience in Hong Kong and Macau SARs with Traditional Chinese as the priority.
- Age 25 years old and above.
- Care about social issues, NGOs, causes, refugees, poverty, human rights, charities, children, travels, international, media, and/or other groups agreed by UNHCR.
- Non-donors of UNHCR.
- Utilize lookalike audience segmentations from existing UNHCR subscribers, unsubscribers, active donors, lapsed donors, volunteers, and other lists of audience.
- Other criteria and audience segmentations to be defined after contract awarded.
- Key performance indicators:
 - Average gift HK\$200.00 for monthly donation
 - Average gift HK\$1,670.00 for one-time donation
 - Acquire 285 monthly donations and 336 one-time donations (Monthly targets will be provided upon contract awarded)
 - 15% growth of the acquisition on a yearly basis
- Content and creative testing development:
 - Requiring proofread for all related promotional materials by the agency before UNHCR approval.
 - Development of weekly A/B testing schedule.
 - Producing and designing social media ads such as macros, infographic, videos, images, or photos with illustration and Photoshop applied to optimize the storytelling and conversion.
- Promotional strategy and objectives:
 - Always-on approach 24x7.
 - Acquire monthly donations as priority and then one-time donations as secondary.
 - Development of promotional strategy includes but not limited to retargeting, audience segmentation testing such as demographic, and interests groups, building lookalike audience, ads format testing, creative testing, campaign messages testing, campaigns' optimization plan, and/or whatever necessary to achieve the objectives.
 - Incorporate UNHCR communications timeline to develop scalability and performance peaks.
 - Apply Facebook best case practice for all advertisement that are desktops and mobile platform friendly.
- Guaranteed response time:
 - Emergency appeals through advertising i.e. videos, photos, posts, message localization within 24 hours.
- Reporting and reviewing

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Daily update and daily breakdown reporting on income, expense, and number of leads, platform (mobile, tablet, or desktop), donations between one-time and monthly, and ROI with share file accessibility through either Google Drive, SharePoint, or other available secured cloud based platform agreed by UNHCR. Record of audience segmentations and creative A/B testing results along with income, expense, number of leads, platform, donations, and ROI on a weekly basis.
- Provide quarterly evaluations and phone discussion based on testing result, market trends, lessons and testing direction in order to adjust the long-term strategy.
- Weekly discuss and review the promotion and adjust it, if necessary, through telephone meetings.
- Other requirements:
 - All reports need to be up to date.
 - Number of emergency is unpredictable as it is based on the opportunity and crisis management decision from UNHCR.
 - Brand guideline needs to be strictly followed: <http://media.unhcr.org/brand>
 - Apply UTM tracking for each promotion URL to capture result through Google Analytics for promotion analysis.

(b) Generic Leads Generation

Number of campaigns per year subject to (1) performance of the first campaign and (2) UNHCR's final decision.

- Platforms requirements:
 - Mobile responsive for any mobile devices and desktops.
 - Shareable content on Facebook, Instagram, email, whatsapp, etc. with share image, page title and call-to-action message friendly.
 - Google Analytics (GA) implementation with UNHCR GA account for both domains www.unhcr.org/hk and <https://donate.unhcr.org/> that allow goal completion tracking for leads, acquisitions, audience, behavior and conversions. Apply consistent tracking methodology across all promotion channels under the UNHCR guidance.
 - Apply UTM tracking for each promotion URL to capture result through GA for campaigns analysis.
- Strategic planning requirements:
 - Development of lead generation program up to three times per year that based on either the UNHCR global campaigns(s) concept and/or innovative ideas from the agency to capture prospects' contact details for fundraising purpose.
 - Apply the learnings from the previous campaign(s) to optimize the result for achieving program objectives.
 - Leveraging the work of UNHCR and refugee issues as part of the objectives and be able to engagement audience to participate campaigns' activities.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Development of social media, email marketing and website conversion journeys for 1) driving prospects to sign up to the campaigns; 2) apply cultivation journeys to convert participants into donors.
- Development of promotional strategy includes but not limited to retargeting, audience segmentation testing such as demographic, and interests groups, building lookalike audience, ads format testing, creative testing, campaign messages testing, campaigns' optimization plan, and/or whatever necessary to achieve the objectives.
- Development of KOLs promotional strategy to help achieve campaigns' objectives.
- Apply paid, own and earn marketing concepts for each conversion stage through social networks, email and web channels.
- Recruit monthly donors as the primary objective and then one-time donors as the secondary goal.
- Incorporate UNHCR communications timeline to develop campaigns' peaks.
- Content and creative development:
 - (Proofread required for all related promotional materials by the agency before UNHCR approval.)
 - Development of campaigns' key messages, lead ads., email content, ad copies, web copies, social media content, and/or co-creating posts with KOLs.
 - Adaptation of two (2) online video(s) / animation(s) per campaign with best practices applied, such as 30 seconds to 1 minute version, subtitling, and call-to-action message, for digital promotion.
 - Adaptation of ten (10) online visual creatives per campaign such as infographic, social media macros, photos, images, carousels, ad text copies, and/or etc. from stock that are size-optimized for social media usage.
- Campaigns periods:
 - February to March 2017
 - July to August 2017
 - September to October 2017
 - Timeline will be subject to change by UNHCR due to the organization priorities
 - Campaigns' timelines and peaks for 2018 and 2019 will be defined by UNHCR in Q4 for the following year, respectively, upon contract renewal
- Key performance indicators:
 - 13,071 valid quality leads by evenly splitting the numbers among each of the campaign period.
 - Single opt in rate equals or larger than 70%
 - For email marketing and web conversion:
 - Monthly donation average gift HK\$200.00
 - One-time donation average gift HK\$1,000.00
 - Equals or larger than 33% new acquisition committed to monthly donation.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- For the telemarketing conversion reference: It will be handled by another external party. The quality leads help drive the success of the telemarketing program:
 - Only Traditional Chinese audience will be contacted
 - Contact rate reach 60% and then 6% monthly donation conversion rate with average gift at HK\$165.00
- 15% growth of the acquisition on a yearly basis
- Lead validation:
 - Complete all compulsory data fields' requirements
 - Age 25 years old and above
 - Hong Kong and/or Macau SARs phone number
 - Unique sign up based on valid email address and phone number
 - More to be defined and agreed during campaign optimization
- Language(s) & audience criteria:
 - Traditional Chinese and English audience in Hong Kong and Macau SARs with Traditional Chinese as the priority.
 - Care about social issues, NGOs, causes, refugees, poverty, human rights, charities, children, travels, international, media, and/or other groups agreed by UNHCR.
 - Age 25 years old and above. Other criteria and audience segmentations to be defined after contract awarded.
 - Non-donors of UNHCR.
 - Utilize lookalike audience segmentations from existing UNHCR subscribers, unsubscribers, active donors, lapsed donors, volunteers, and other lists of audience.
- Lead capture and compulsory requirements with validation messages:
 - Title i.e. Mr, Ms, Mrs (others to be defined when necessary)
 - Name i.e. one name text field
 - Contact phone i.e. numeric field with country code pre-populate
 - Year of birth i.e. selection between 1930 and 2017 (participants required to be 18 years old and above to proceed)
 - Email address with email format validation (duplicate signup is allowed but will not be counted as a valid lead)
 - Optin/optout preference i.e. compliance with data privacy law in Hong Kong SAR with a statement provided by UNHCR
- Reporting and prepare data file by campaign:
 - Required daily update and daily breakdown reporting on income, expense, and number of leads, platform (mobile, tablet, or desktop), donations between one-time and monthly, and ROI with share file accessibility through either Google Drive, SharePoint, or other available secured cloud based platform agreed by UNHCR.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Record of audience segmentations and creative A/B testing results along with income, expense, number of leads, platform, donations, and ROI.
- Allow real-time data file download in .CSV or .TXT UTF-8 format.
- Participant's contact detail is required to be stored with a password protected environment.
- Data file fields include:
 - Sign up date and time in GMT+8
 - Sign up platform
 - Title
 - Name
 - Contact phone
 - Year of birth
 - Email address
 - Optin/optout preference
 - Referral source URL
 - UTM campaign
 - UTM medium
 - UTM source
 - UTM content (optional)
 - UTM term (optional)
 - Location i.e. country / city based on IP address (optional)
- Email conversion requirements and reporting:
 - Required real-time data synchronization with UNHCR email system called Exact Target Salesforce Marketing Cloud (ET) via API connection, form post or other solution(s) agreed by UNHCR. (Please specify as optional service.)
 - (ET integration guide for reference:
https://help.marketingcloud.com/en/documentation/exacttarget/resources/solution_guides/adding_a_sign_up_form_to_your_website/)
 - Development of email cultivation journey is required but optional to be executed via ET with schedule email function and/or trigger email feature. Send job execution is required through UNHCR staff if ET solution is selected. If ET is not the journey platform, agency needs to provide an alternative tool/platform for the email journey execution.
 - Development of email cultivation schedule and content to convert prospects into donors.
 - Development of one (1) email content in HTML format that is mobile responsive for telemarketing agency to follow up conversion.
 - Development of donor-get-donor email strategy where necessary.
 - Development of email journey performance report, i.e. open rate, click rate, conversion rate between one-time and monthly donations, sign up platforms and

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

etc., on a weekly basis and then analysis the result to optimize the communication journey as well as the promotional strategy accordingly.

- Key opinion leaders:
 - Development of KOL(s) strategy to achieve lead generation program objectives with paid promotion through social networks.
 - Acquire three (3) local KOLs for each campaign who are actively on social networks that meet the lead generation audience criteria and co-creating three (3) social media posts from each of them by campaign through their accounts.
 - KOL criteria:
 - Positive image with high credibility in Hong Kong society that can reach the programme audience.
 - Communications in Cantonese, Traditional Chinese as the priority and then English as optional.
 - At least 35,000 fans on Facebook page with majority Hong Kong audience
 - Political neutral without conflict of interests to UNHCR.
 - Care about social issues, NGOs, causes, refugees, poverty, human rights, charities, children, travels, international, media, and/or other groups agreed by UNHCR.
 - Available with post boosting on social networks is preferred.
- Other requirements:
 - In case of emergencies/disasters, UNHCR will use emergency content to raise public awareness. The original program timeline and budget may be shifted accordingly.
 - Social media platform(s) API connection with lead generation program is optional if it helps with the lead generation sign up / conversion.
 - Budget allocation suggestion (excluding the agency fee) for investment related to “Generic lead generation programs”
 - less than or equal to 19.58% for the production cost
 - less than or equal to 55.42% for the media cost
 - less than or equal to 25% for the KOL cost
 - Budget allocation is negotiable with UNHCR to achieve the program objectives.
 - Development of comprehensive evaluation upon completion of each campaign within two (2) weeks. Evaluation requirements include but not limited to:
 - PowerPoint or PDF format.
 - Lesson learning to be carried forward into the next lead generation campaign.
 - Income, expense and outcome for each conversion journey and promotional channel with qualitative and quantitative analysis.
 - Overall marketing and campaigns’ strategy review on success and failure elements.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

- Close monitoring performance and campaign optimization two (2) times per week. Exact timetable to be agreed with UNHCR. Testing includes but not limited to:
 - Audience testing, creative testing, ad testing, sign up optimization, and/or etc. through a systematic approach or computerize the testing is preferred.
- Review the telemarketing result provided by UNHCR on a weekly basis to optimize the promotional and communications strategy.
- Avoid budget underspends on a monthly basis.
- UNHCR brand guideline needs to be strictly followed:
<http://media.unhcr.org/brand>
- Authenticated UNHCR photos and videos platform: <http://media.unhcr.org>

Agency will execute the media buy on behalf of UNHCR. It is required to share the advertising account(s) access to UNHCR for monitoring purpose.

2.2 Customer Responsibilities

- UNHCR will provide certain marketing assets. Please see section 2.1 above for details.
- If interested, some of the past examples of campaign materials edited/created by vendors are available at the following links, for reference only:
 - <https://www.facebook.com/hkunhcr/videos/1242646925753369/>
 - <https://www.facebook.com/hkunhcr/videos/1242623895755672/>
 - <https://www.facebook.com/hkunhcr/posts/1240063909345004>
 - <https://www.facebook.com/hkunhcr/posts/1270505706300824>
 - <https://www.facebook.com/hkunhcr/posts/1270491796302215>
 - <https://www.facebook.com/hkunhcr/videos/1238850399466355>
- There are also some clippings of previous press coverage of UNHCR Sub-office Hong Kong, coordinated and liaised by vendors, available at the following links for reference:
 - <http://std.stheadline.com/daily/news-content.php?id=973887&target=2>
 - <https://yp.scmp.com/entertainment/movies/article/103655/syria%E2%80%99s-struggle-and-barrel-bombs-centre-hong-kong%E2%80%99s-refugee>
 - <https://yp.scmp.com/entertainment/movies/article/103656/documentary-film-boxing-freedom-puts-spotlight- plight-women>
 - https://www.dropbox.com/sh/h6c63xpb7t9up9h/AABgxK-LMb0L_KsrAzGy1s0la?dl=0

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

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:

3.1 Company Qualifications

- A description of your company with evidence of your company's capacity to perform the services required, including:
 - Company profile, registration certificate and last audit reports
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates.
- Three or more letters of reference, with contact information.
- Please advise if your company is working or has worked with:*
 - another UNHCR office or any other UN organization;
 - in the public sector / NGOs;
 - government(s); or
 - in a UNHCR environment/ work setting.

*If yes, please provide UNHCR with the Name of the Contact Person and Contact Information in your Technical Offer, even if s/he is not one of your 3 references.

- Number of similar and successfully completed projects, and number of similar projects currently underway; client references; and total number of clients your company currently services in Hong Kong and/or Macao SARs as well as elsewhere and their identities.

3.2 Proposed Services

- Proposed work approach and deliverables.
- Ability of the proposed campaign to:
 - Raise funds (both regular and one-off)
 - Generate leads (potential donors) of good quality, with accurate contact details such as phone number and email address, not including opted-out ones
 - Enhance brand awareness and support for UNHCR from the general public
 - Generate news coverage
- Types, relevance, depth and breadth of analysis, plans and performance reports, KPIs and deliverables.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

3.3 Personnel Qualifications

- The composition of the team (with names, titles and relevant information) you propose to provide, including project managers, paid staff, subcontractors, consultants;
- Describe the roles and responsibilities of each key member of your team (who will directly handle/supervise the tasks/project) in fulfilling the full range of tasks included in the TOR as well as the project as a whole;
- Specify the number of months of service of each individual (who will directly handle/supervise the tasks/project) in your company;
- Describe their experience and expertise in working on similar projects.

3.4 Vendor Registration Form

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

3.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing this document (Annex D) and including it in your submitted Technical Proposal.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

4 Evaluation

4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

Company Qualifications (20%)	<ul style="list-style-type: none"> • Capacity to undertake contract • References • Experience working with the Not-for-profit and/or UN organizations • Experience working in similar projects
Proposed Services (30%)	<ul style="list-style-type: none"> • Proposed work approach and deliverables • Ability of the proposed campaign to: <ul style="list-style-type: none"> ○ Raise funds (both regular and one-off) ○ Generate leads (potential donors) of good quality, with accurate contact details such as phone number and email address, not including opted-out ones ○ Enhance brand awareness and support for UNHCR from the general public ○ Generate news coverage • Comprehensiveness of proposal • Clarity interpreting and presenting communication services • Types, relevance, depth and breadth of analysis, plans and performance reports, KPIs and deliverables
Personnel Qualifications (20%)	<ul style="list-style-type: none"> • Team and personnel capabilities relevant to the scope of services • Team structure in covering the various aspects of project • Team experience in delivering projects of comparable nature and scale

The technical offer will be evaluated using the above criteria and percentage distribution:

70% from the total score. Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal in order to be considered further for the financial evaluation.

Bidders are required to submit any request for clarification or any question in respect to this TOR by e-mail to chiho@unhcr.org. The deadline for receipt of questions is 23:59 hrs Hong Kong Time on 8th of December 2016.

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected suppliers.

- Complete each item in the Requirements
- Raise funds (both regular and one-off)
- Generate leads (potential donors) of good quality, with accurate contact details such as phone number and email address, not including opted-out ones
- Enhance brand awareness and support for UNHCR from the general public
- Generate news coverage
- Enhance public engagement for UNHCR
- Fulfill all KPIs maintained in “Core Requirement”