



**ANNEX A: TERMS OF REFERENCE
CHINA/RFP/RBAP/PSP/2020/003
FOR THE PROVISION OF DIGITAL MEDIA COMMUNICATIONS SERVICES**

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Goran Stojanovski (stojanov@unhcr.org) and Erzsebet Gal (galer@unhcr.org). The deadline for receipt of questions is the 1st of April 2020 23:59 GMT + 8 hrs. (Beijing time zone).

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1 Introduction

1.1 Background

Every year, millions of men, women and children are forced to flee their homes to escape conflict and persecution. UNHCR aims to protect them, saving lives, focusing on their basic needs and rights and helping them build a better future.

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 9,000 personnel is helping more than 65 million people in 125 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 China

In the last 10 years, UNHCR has grown its private sector income from USD 34 million in 2007 to USD 423 million in 2018. This represents 10 percent of the total income and has been achieved through the financial support of two million individuals, most of whom give regular donations; and of companies, foundations and philanthropists partnering with UNHCR to deliver critical programmes and raise awareness of the refugee cause. The purpose of the Private Sector Partnerships Service (PSP) China is to maximise UNHCR's engagement with the private sector in order to mobilise support and resources for the refugee cause.

Within the Individual Giving strategy, currently digital engagement is our main stream for supporter acquisition and development and to increase UNHCR brand awareness and positioning in China. PSP activities in China started in 2019 and now launched 2 charity programs online via partnering with Amity Foundation:

- Education for Girls: <https://gongyi.qq.com/succor/detail.htm?id=213883>
- Syria Winterization: <https://gongyi.qq.com/succor/detail.htm?id=220044>

In the future, other channels such as offline event or exhibition will potentially be added, while digital is now our main acquisition stream but also a key supporter development and engagement channel. We are currently running digital acquisition through social media campaigns, KOL endorsement and paid display & retargeting advertising. Digital is and will remain one of our main acquisition channels alongside direct marketing and public engagement advertising.

We are committed to the ongoing improvement of our digital engagement environment from an acquisition and conversion standpoint – both from a creative and technical perspective. We plan to run advocacy and engagement campaigns to secure new email leads for subsequent engagement efforts. We aim to test more online direct response campaigns in the next 3 years with a substantial digital component including mobile-end search, email marketing and social media.

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1.2 Statement of Purpose & Objectives

UNHCR is aiming to boost the digital presence of UNHCR globally to deliver long-term sustainable solutions that provide security, dignity and a future for refugees. With our strategy of 'Digital First' we will look first for digital opportunities in everything we do, locally and globally. Our global investment will prioritize rapid expansion of digital supporter engagement.

In order to progress in multi-channel integration UNHCR is seeking firstly to contract with a communications agency to help manage integrated acquisition campaigns to better assimilate all media channels, including both supporter engagement and social media campaigns. Also to provide best of class digital and offline creative services, strategic support, creative content and communications focusing on supporter experience, performance and data, in order to:

- Promote online charity programmes and optimize the performance;
- Supporters acquisition, both one-off and regular;
- Improve supporter loyalty and long-time value;
- Generate leads via digital engagement such as gamification, mini-websites, Html5 or any other innovative tool;

It is essential that any communications agency that responds to this tender can demonstrate their core digital competency and team experience related to charity engagement. UNHCR will be engaging the selected agency to lead on social media campaigns, including supporter acquisition, lead generation, supporter engagement, advocacy campaigns, digital and event asset creation, and brand engagement. PSP China expects from the company to maximize ROI.

- An integrated full-functional team base in mainland China, Beijing office is preferred.
- Full service integrated acquisition, digital creative, content development, social media crisis prevention and account management services capacity
- Full service with digital media amplification, media and KOL partnering and pitching, media content planning and production, media clipping and data analysis report.

The Frame Agreement will be signed with the successful bidder(s) for one (1) year and will be extended at the sole discretion of the UNHCR for additional two (2) years. Total length of contact is three (3) years:

- Phase 1: June 2020 - May 2021 (12 months)
- Phase 2: June 2021 - May 2022 (12 months)
- Phase 3: June 2022 - May 2023 (12 months)

PSP China would like to identify qualified companies based on the following services:

- Creative Digital campaigns design and development
- Media amplification, implementation, management and reporting

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company is the project lead to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winner bidder will be the contracted party, responsible for performance. UNHCR will deal with

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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.

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

- Phase 1: June 2020 - May 2021: To generate 6,000 new one-off supporters and 10,000 leads; To achieve 6,000,000 social media exposure and 6,000 social media engagement.
- Phase 2: June 2021 – May 2022: To generate 10,000 new one-off supporters and 20,000 leads; To achieve 7,000,000 social media exposure and 7,000 social media engagement.
- Phase 3: June 2022 – May 2023: To generate 14,000 new one-off supporters and 30,000 leads; To achieve 8,000,000 social media exposure and 8,000 social media engagement.
- Meet annual digital budget targets and required ROI criteria as specified in annual Statements of Work (SOW).

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 in order to get a realistic indication.

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2 Requirements

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

In order to be eligible to participate at this bidding, your company must have local office in mainland China and your company must be authorized to work / do business in China. In order to establish compliance with this criteria, company profile and registration certificate are to be sent. 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.

The proposal should be presented in English. In terms of creative content part, Chinese can be used for better demonstration.

2.1 Creative Digital campaigns design and development

To achieve the goals of promoting charity programs and generating qualified leads, we expect the agency to create an overall digital strategy by creating, implementing and testing various digital campaigns or supporter journeys, depending on season, event, thematic, emergency.

Please describe how you will:

Develop, implement, test and run digital campaigns like:

- Seasonal campaign: Winterization / End of Year campaign;
- Thematic campaign: World Refugee Day, Women's Day, healthcare campaign, education campaign for example;
- Any other suggestion is welcome.

Create, implement, test and run journey such as:

- Supporter's journey: from one-off to loyal or regular;
- Supporters' journey: from lead generation to be converted through multichannel;
- Development and maintain regular supporter loyalty program;
- Welcome and stewardship programme for new supporters;
- Any other suggestion is welcome

The agency is also required to provide:

- Create microsites and websites for digital acquisition projects/campaigns;
- Develop and propose any creative content relevant to achieve our goals;
- Development and design of key message(s)/propositions which will appeal to the target audiences and reflects UNHCR's branding and areas of work;
- Development of creative display ads, using text, images, animation and video for display and retargeting within UNHCR branding;
- Develop social media advertising creatives;
- Test and optimize landing page to improve returns from search and paid advertising whether for charity or for a lead generation campaign;
- Develop copy, design and HTML for email marketing campaigns for subsequent communications to UNHCR supporters;
- Translation or writing of emails/newsletters/pushing news;
- Recommendations for landing page, website and email appeals design and content to offer a fully integrated supporter-centric online user experience;
- Recommendations and implement audience research and insights across multiple digital

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channels.

- Description of the core team dedicated to work with UNHCR PSP China to prove strong account management.
- Monitor and report on all key metrics and overall ROI;
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI. (Leads, optimization, landing page conversions etc.);
- Provide quarterly analysis reports assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of acquisition activities in previous quarter including detailed attribution tracking;
- Continuously optimize, adjust and recommendations to digital marketing program in order to achieve digital engagement objectives, conversion rate and audience expansion targets;
- Provide all services in compliance with data protection regulations and GDPR;
- Monitor online public voice on daily base;
- Forecast, decrease and solve social crisis timely and properly;
- In case of emergency, all focus needs to go to the emergency within 24 to 48 hours to be able to raise as much support as possible for the crisis and to boost global engagement. Please tell us how you propose to be ready for an emergency, where very fast production and implementation is required in pressing timings:
 - ✓ Which mechanism do you propose?
 - ✓ Do you already have tools to respond to such short implementation? Or which tools do you recommend setting up to be ready?
 - ✓ What kind of responsiveness are you able to offer?
 - ✓ Please propose a draft of an effective retro planning in case of an emergency campaign

2.2 Media amplification, implementation, management and reporting

- Media amplification, implementation, management and reporting. Provide media/KOL/celebrity resource and pitching capability;
- Provide and describe media/KOL/celebrity relationship management experience as well as capabilities of planning proper angles/talking points to promote on digital channels, in order to generate positive social topics and maximize public engagement with KOL/Media collaborations;
- Prevent and reduce negative social feedback risk during multi-channel communications including 3rd party's cooperation;
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI;
- Provide continuous optimization, adjustments and recommendations to digital acquisition program, in order to achieve digital charity program performance and online supporter engagement objectives;
- Propose account structure and manage the paid search engine marketing channel, implement and optimize this channel and ensure an overall positive ROI (currently not eligible);
- Please provide recommendations for search creatives and optimization of search content (currently not eligible);
- Provide creative approach and audience targeting strategies for earned/paid social

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- marketing and optimize these channels;
- Provide strategy and methodology for bidding/negotiating with digital platforms to pitch/purchase space for banner advertising/programmatic display and other appropriate forms of online advertising;
 - Provide media strategy for retargeting, native advertising or any other new digital channels based on latest trends and innovation for acquisition and brand awareness raising;
 - Provide recommendations for conversion tracking and multichannel tracking;
 - Monitor and report on all key metrics and overall ROI;
 - Please describe your view on innovation and which innovative projects you have done recently. Please explain your suggestions and innovative ideas and approach for setting up a sustainable acquisition and retention programmes (including supporter journeys) for UNHCR.
 - Describe the team working on UNHCR account and the level of response to act on media pitching/buying activities in due time.
 - In case of emergency, all focus needs to go to the emergency within 24 to 48 hours to be able to raise as much support as possible for the crisis and to boost global engagement. Please tell us how you propose to be ready for an emergency, where very fast production and implementation is required in pressing timings:
 - ✓ Which mechanism do you propose?
 - ✓ Do you already have to tools to respond to such short implementation? Or which tools do you recommend setting up to be ready?
 - ✓ What kind of responsiveness are you able to offer?
 - ✓ Please propose a draft of an effective retro planning in case of an emergency campaign

2.3 Performance of Work

The appointed vendor is responsible to provide all supervision, equipment, labor and materials necessary to complete the work as described herein. The vendor shall supervise and complete the project using its best skill and attention. The vendor shall furnish management, supervision, coordination, labor and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of these Terms of Reference.

All services rendered by the vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The vendor shall conduct all its activities in strict confidence. The vendor shall handle and respect data privacy, if applicable, in a professional manner.

2.4 Compliance with the Legal Requirement

The vendor shall comply with all China 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. In addition, the vendor should comply with General Data Protection Regulation.

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2.5 Customer Responsibilities

- Provide a dedicated project manager;
- Providing information and content about UNHCR's mission and activities;
- Provide logos, materials and existing campaign assets to be adapted to China local market as needed;
- Provide access to UNHCR content and brand guidelines for the elaboration of campaigns;
- Approve all media assets, keywords, and ad copy;
- Allow 3rd party trackers to be included in webpages if applicable;
- Share access and technical specifications for the CMS solution(s) and email platform to be used by the UNHCR if applicable
- 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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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. Only offers compliant with the pre-selection criteria will be considered for evaluation.

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 (1) *financial soundness and stability* and your (2) *digital media service provision experience*:

(1) Financial soundness and stability:

- Last balance sheet, last year audit reports or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company`s financial soundness and stability.
- Year founded
- 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;
- Total number of clients, please provide a list;
- Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

(2) Digital media service provision experience:

- Relevant experience working with international companies, international non-profit organizations, charity foundations or United Nations organizations. Please include event/clipping and celebrity/KOL partnering experience (previous and current in total) in the non-profit sector (i.e. charity). A proven track record in delivering innovative and up to date, paid media campaign solutions with a predominant focus on digital channels.

Any information that will facilitate our evaluation of your company`s substantive reliability, financial and managerial capacity to provide the services.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *your company`s compliance regarding the required services listed under the relevant sub-section (2.1, 2.2) of section 2 and the capacity to achieve the proposed targets* and (2) *any innovative idea, strategy to acquire supporters and to improve conversion rate*:

- 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 achieve the proposed targets.
- Please explain any innovative suggestion your company has, in terms of campaigns, paid media strategy, channels, leads generation, charity program operations, supporter journey

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- approach or any other strategy aimed to acquire quality, long-term committed high life-time value supporters and reduce the attrition rate.
- Please provide the following samples:
 - ✓ Creative Digital campaigns design and development: one (1) sample of a digital campaign, three (3) successful creative pieces, and one (1) sample of campaign and analysis report.
 - ✓ Media amplification, implementation, management and reporting: one (1) sample media plan, one (1) sample campaign management report and one (1) sample of an analysis report;

3.3 Staff qualifications, account management

Account management is crucial for running a successful digital campaign. This section is dedicated to measure the proposed customer service towards UNHCR PSP China 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.

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

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 (ANNEX D) and send back the signed version (each page initialed and dated) along with your technical proposal.

3.6 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) send back the signed version (each page initialed and dated) along with your technical proposal.

3.7 Content of Your Financial Proposal

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

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4 Evaluation

The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: 70% from the total score (on a 100 points scale, i.e. max 70 points obtainable for the technical offer). Please find hereunder the detailed scoring breakdown.

4.1 Technical evaluation

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (5 points)	Please submit last balance sheet, last year audit reports OR any financial statement, public audit, risk scores given by qualified companies are provided to enable UNHCR to assess financial soundness and stability.
Digital media service provision experience provision experience in total (non-profit & for-profit sector) (15 points)	The scores will be allocated for the number of clients (previous and current in total) based on the evidence provided. Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted <i>in case of selection</i> .
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Compliance with the requirements listed under 2.1 (12.5 points)	A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1 including: <ul style="list-style-type: none"> • one (1) sample of a digital campaign • one (1) sample of campaign and analysis report <i>Please note that without samples, 0 points will be given.</i>
Capability to produce high quality creative content to achieve proposed targets listed under 1.2 (12.5 points)	Comprehensive proposal to be presented to demonstrate capacity to produce high quality creative content, including: <ul style="list-style-type: none"> • three (3) successful creative pieces <i>Please note that without samples, 0 points will be given.</i>
Compliance with the requirements listed under 2.2 (10 points)	A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.2 including: <ul style="list-style-type: none"> • one (1) sample digital media plan • one (1) sample campaign management report

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	<ul style="list-style-type: none"> one (1) sample of an analysis report <p><i>Please note that without samples, 0 points will be given.</i></p>
Any innovative idea, strategy to acquire quality, long-term committed high life-time value supporters and reduce the attrition rate (5 points)	Any innovative idea to be presented to acquire quality, long-term committed high life-time value supporters and reduce the attrition rate.
Staff qualifications, 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. (Including experience with similar projects)	The scores will be allocated based on the number, relevant experience and daily service hour of the full functional service core people working on UNHCR account.

The minimum passing scores of the evaluation is 40 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

Companies might be requested to deliver a presentation based on their technical proposal via WebEx. The dates for the presentations will be communicated in time.

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 that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

Please include your daily consultancy service rate on Annex B (sheet 2 for cost breakdown) for information.

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5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier on a monthly basis according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of product and service
- Quick to market launch of emergency appeals/campaigns
- ROI for campaigns and media buy activities
- Actual supporter per month
- Leads per month
- Supporter conversion rate
- Performance of UNHCR brand awareness and conversion rate in China
- Overall teamwork between supplier and PSP China