

## TERMS OF REFERENCE FOR INSTITUTIONAL CONTRACTS



**UNICEF, Bangkok**

Requesting Section: **Online Marketing LTA for Digital Fundraising**

---

**TITLE: Terms of Reference for Long Term Agreement for the provision of online marketing services for UNICEF Thailand digital fundraising activities.**

### **1. Background**

UNICEF Thailand is looking to accelerate the growth of digital fundraising revenue by maximizing our use of digital fundraising and marketing channels across a range of campaign activity. The focus of this brief is on acquiring regular donors and one-off gift through carefully planned through social media activity.

To enable this activity UNICEF Thailand has invested in our digital platforms to make the path to donation simpler for our potential supporters.

UNICEF Thailand fundraising platform includes two main donation options which are;

1. **Normal donation** page for monthly donation and one-off donation
2. **Inspired gifts donation** page providing e-commerce like experience of which donors can shop for virtual life-saving products and UNICEF will deliver to children who needed most

Acquiring monthly donation has become increasingly important, as monthly donation will deliver long-term aid that creates lasting change for children as well as addressing children's immediate needs. This will ensure a regular and sustainable support for our long-term programmes for children in Thailand and around the world.

In 2014, UNICEF has started running search engine marketing (SEM) activity and in the same year has been granted an ongoing support from Google called Google Grant which allows UNICEF to run Google Ads campaign for free of charge under the budget of USD 10,000 per month.

Apart from the ongoing SEO and SEM activities, UNICEF has explored more possibilities in recruiting new donors through other online channels such as Google Display Network, Social Media, LINE Ads, TikTok and Banner Advertising on selected websites.

In 2021, UNICEF plans to establish a long-term agreement (LTA) with one or more qualified institutions to provide online marketing services for UNICEF Thailand digital fundraising activities to effectively acquire regular monthly donors (internally called pledge donors), one-off donors and potential leads for donor conversion activities for initial period of 12 months with possible extension of 24 months.

### **2. Objectives, Purpose & Expected results**

- To acquire new 2,200 pledge donors and 3,750 new one-off donors in 2021.
- To acquire new 60,000 leads (name, telephone number and email) for donor conversion activities in 2021 with the target minimum conversion rate of 3%.

- To raise THB 10,000,000 with the minimum ROI of 1.5:1 in 2021.

### **3. Description of the assignment**

The purpose of this assignment is for developing and implementing online marketing activities to effectively acquire regular monthly donors, one-off donors and potential leads for donor conversion activities as per expected results/KPIs indicated under Point 2

The online marketing activities aim to achieve the objectives and reach mass targets through channels such as: SEO, SEM, Google Grant, GDN, Display Ads, Social Media, LINE and TikTok if deemed necessary, adapting any material for the support of offline promotion activities such as television, radio, out of home or event.

### **4. Deliverables**

Type of service provides rough idea of the activity UNICEF Thailand are expecting to conduct during the LTA period. These services should cover all tasks required to implement successful activities such as creating strategy and plan, producing materials, managing and operating, monitoring and evaluating, etc. However, this does not mean that UNICEF Thailand will conduct all types of activity. UNICEF Thailand will decide what type and frequency of service to happen during the LTA period.

All types of service should include testing activity to enhance knowledge and understanding of the online activity. Adequate tracking systems including but not only Google Analytics are required.

The contractor must give UNICEF office and other UNICEF partners full administrative access and overall account ownership to any advertising/analytics accounts used including but not limited to:

- Google Ads
- Google Analytics
- Facebook Ads

Specifically, for Google Ads and Facebook: the agency must ensure that all activities are run via a dedicated advertising account that contains ONLY UNICEF advertising campaigns, i.e. the advertising account must not be shared with other advertisers. UNICEF must have full administrative access and overall account ownership of advertising account.

The Google Ads account must be linked directly with all available views in our Google Analytics account and relevant conversion data set to import into Google Ads

UNICEF Thailand receives Google Grant US\$ 10,000 per month.

The list below is type of service options, bidder may choose to submit proposal with either one or all options:

#### **1. Full-service online marketing for Digital fundraising**

Description: to conduct all tasks required to implement successful activities such as creating strategy and plan, producing materials, managing and operating, monitoring and evaluating for online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.

Example: Ongoing campaign,

**2. Campaign strategy, creative and production service for Digital fundraising campaign**

Description: to produce campaign strategy and/or produce material for UNICEF Thailand to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.

**3. Media service for Digital Fundraising campaign**

Description: to manage media spending operation, monitoring and evaluating for UNICEF Thailand to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.

The list below is a summary of the types of campaign that UNICEF may consider to run during the LTA:

**1. On-going fundraising campaign (Normal Donation and Inspired Gifts) - minimum of one campaign each year during LTA period**

- a. Objective: to acquire regular monthly donors and one-off donors or Inspired Gifts donors (with the average monthly donation of THB 600, average one-off donation of THB 1,000, and average Inspired Gifts donation of THB 1,000).
- b. Expected donation income: Baht 2,000,000 – 3,000,000
- c. Description: to conduct on-going online marketing activities to achieve KPIs through digital channels.
- d. Reports:
  - i. weekly report in soft file with a conference call
  - ii. monthly report in soft file with a monthly meeting
  - iii. quarterly meeting on key learnings, strategy and plan review, competitors and market knowledges and update, etc.

**2. Large scale fundraising campaign (Normal Donation or Inspired Gifts) 0-2 campaigns during LTA period**

- a. Objective: to acquire regular monthly donors and one-off donors or Inspired Gifts donors (with the average monthly donation of THB 600, average one-off donation of THB 1,000, and average Inspired Gifts donation of THB 1,000).
- b. Expected donation income: THB 3,500,000 – 5,000,000
- c. Campaign Period: 2 – 4 months
- d. Description: to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.
- e. Reports:
  - i. monthly report in soft file with a monthly meeting to review and optimize the performance of the campaign
  - ii. summary report and presentation on the result, challenges, key learnings and recommendation

**3. Medium scale fundraising campaign (Normal Donation or Inspired Gifts) 0-2 campaigns during LTA period**

- a. Objective: to acquire regular monthly donors and one-off donors or Inspired Gifts donors (with the average monthly donation of THB 600, average one-off donation of THB 1,000, and average Inspired Gifts donation of THB 1,000).
- b. Expected income: THB 2,500,000 – 3,500,000
- c. Campaign Period: 2 – 3 months

- d. Description: to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.
  - e. Reports:
    - i. monthly report in soft file with a monthly meeting to review and optimize the performance of the campaign
    - ii. summary report and presentation on the result, challenges, key learnings and recommendation
4. **Small scale fundraising campaign** (Normal Donation and Inspired Gifts) 1-3 campaigns during LTA period
- a. Objective: to acquire regular monthly donors and one-off donors or Inspired Gifts donors (with the average monthly donation of THB 600, average one-off donation of THB 1,000, and average Inspired Gifts donation of THB 1,000).
  - b. Expected income: THB 1,000,000 – 2,500,000
  - c. Campaign Period: 1 – 3 months
  - d. Description: to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.
  - e. Reports:
    - i. monthly report in soft file with a monthly meeting to review and optimize the performance of the campaign
    - ii. summary report and presentation on the result, challenges, key learnings and recommendation
5. **Lead generation campaign** 1-3 campaigns during LTA period
- a. Objective: to acquire new leads or database of potential donors including name, telephone number and email for UNICEF Thailand to convert to become monthly donors.
  - b. Expected result:
    - i. lead conversion rate to monthly donation minimum at 3% (based on reached)
    - ii. Works closely with telemarketing agency (with UNICEF facilitation). Digital agency then action based on telemarketing agency feedback.
    - iii. Expected to acquire minimum of 60,000 contactable leads
  - c. Description: to conduct online marketing campaign to achieve KPIs and reach mass targets through digital channels and plus adapting any material necessary for the support of offline promotion activities such as television, out of home or event.
  - d. Reports:
    - i. weekly report in soft file with a conference call
    - ii. monthly report in soft file with a monthly meeting
    - iii. quarterly meeting on key learnings, strategy and plan review, competitors and market knowledges and update, etc.

For any other requirements from UNICEF such as online activities to engage with existing donors, etc., the contractor shall provide a separate quotation for each requirement.

## 5. Reporting requirements

- Monthly report in soft file with a monthly meeting
- Quarterly meeting on key learnings, strategy and plan review, competitors and market knowledges and update, etc.

## 6. Location and Duration

- The assignment will be undertaken in Bangkok.
- The initial duration of the LTA is 12 months with possibility for extension of 24 months based on satisfactory performance and agreement of both contracting parties.
- The Long Term Arrangement(s) is/are tentatively to be established in January 2021.

## 7. Qualification requirements or Specialized skills/Experience Required:

### **Mandatory:**

- The Contractor (and any sub-contracted institution under the lead contractor) must be legally permitted to operate and have a license (if required by law) to carry out the required tasks.
- The Contractor or sub-contractor must be established for more than 2 years.
- The Contractor or sub-contractor must have minimum language requirement of Thai and English.
- The Contractor must have direct experience in the required tasks.
- The Contractor or sub-contractor must have minimum of 4 years work experience.

### **Desirable:**

- Previous working experiences with non-profit organization
- Previous working experiences with fundraising activities.

## 8. Evaluation process and methods

The evaluation panel will first review each response for compliance with the mandatory requirements of this RFPS. Failure to comply with any of the terms and conditions contained in this RFPS, including provision of all required information, may result in a response or proposal being disqualified from further consideration. Kindly also refer to the detailed instructions in the main LRPS document.

Each valid proposal will be assessed by an evaluation panel first on its technical merits and subsequently on its price. For this RFPS, the weight allocated to the technical proposal is 70 % (i.e. 70 out of 100 points). To be further considered for the financial evaluation a minimum score of 49 points is required. Only proposals with a score of 49 or more points in the technical evaluation will be financially evaluated (i.e. the financial proposal will be opened). For further details and the distribution of points kindly refer to **table 1** below.

The weight allocated to the financial proposal is 30 % as per the following: the maximum number of 30 points will be allotted to the lowest technically compliant proposal. All other price proposals will receive points in inverse proportion to the lowest price. Commercial proposals should be submitted on an all-inclusive basis for providing the contracted deliverables as described in the TOR.

The proposal(s) obtaining the overall highest score after adding the scores for the technical and financial proposals is the proposal that offers best value for money and will be recommended for award of the contract.

### **Table 1: Evaluation Criteria and distribution of points**

CATEGORY	Max. Points
<b>1. OVERALL RESPONSE</b> <ul style="list-style-type: none"> <li>Understanding of, and responsiveness to the requirements <b>(10)</b></li> <li>Understanding of scope, objectives and completeness of response <b>(10)</b></li> </ul>	<b>20</b>
<b>2. METHODOLOGY</b> <ul style="list-style-type: none"> <li>Quality of the proposed approach and methodology <b>(10)</b></li> <li>Quality of proposed implementation plan, i.e. how the bidder will undertake each task, and time-schedules <b>(5)</b></li> <li>Risk assessment - recognition of the peripheral problems and methods to prevent and manage peripheral problems / quality controls <b>(10)</b></li> </ul>	<b>25</b>
<b>3. PROPOSED TEAM and ORGANISATIONAL CAPACITY</b> <ul style="list-style-type: none"> <li>Team members - relevant experience, skills &amp; competencies <b>(10)</b></li> <li>Professional expertise, knowledge and experience with similar projects, contracts, clients and consulting assignments <b>(15)</b></li> </ul>	<b>25</b>
<b>TOTAL POINTS FOR TECHNICAL PROPOSAL</b> (min. passing score = 49 points)	<b>70</b>
<b>4. FINANCIAL PROPOSAL – as per Annex C</b> <ul style="list-style-type: none"> <li>Full marks are allocated to the lowest priced proposal. The financial scores of the other proposals will be in inverse proportion to the lowest price.</li> </ul>	<b>30</b>
<b>TOTAL POINTS</b>	<b>100</b>

The technical proposal should include sufficient information to enable the technical evaluation team to evaluate your proposal in accordance with the listed evaluation criteria, including the following:

1. Creative Concept of each service type (full campaign execution does not need to be presented)
2. Scope of work and deliverable of each service type
3. Timeline of each service type
4. Samples of the similar campaigns of each service type

#### 9. Administrative issues

- Bidders are requested to provide a detailed technical proposal in **Annex C** – Technical proposal response form.
- Bidders are requested to provide a detailed cost proposal in **Annex D** – Financial proposal response form.
- The bidder is requested to provide an all-inclusive cost in the financial proposal. The bidder is reminded to factor in all cost implications for the required service/assignment.
- Travel is not anticipated for this assignment.
- After the Long Term Arrangement has been established, a separate contract will be issued based on specific assignment.

#### 10. Payment

- UNICEF's payment terms is 30 days net upon receipt of approved invoice.
- The payment schedule must be based on completed deliverables. Payment schedule(s) can be proposed by the bidder.

## **11. Any other Information**

Special Terms and Conditions to be stipulated in Contract:

UNICEF reserves the right to terminate the Contract if following conditions are not met by the Contractor (Related clauses on charge value and penalty charge calculation method will be negotiated with the contractor before issuing the contracts):

- a) The Contractor hereby irrevocably assigns to UNICEF all right, title and interest in and to all work product and documentation produced pursuant to UNICEF's requests for services hereunder including, without limitation, all applicable Intellectual Property Rights.
- b) All information is confidential, and the contractor must not disclose or divulge any donor details to a third party.
- c) The Contractor will acquire no legal or beneficial title or ownership of Donor Details.
- d) The Contractor will not use the database for any other purpose other than stated in the TOR.
- e) The Contractor must return or destroy all confidential information (including all copies of and material representing such confidential information) to UNICEF immediately upon demand or upon termination of the contract.
- f) The Contractor must adhere to international standard in a) security of financial information of donors and b) data protection.
- g) UNICEF reserves the right to terminate the contract anytime by issuing a formal letter two months in advance to the contractor.
- h) In all cases, the contractor may only be paid their fees upon satisfactory completion of services. Unsatisfactory performance: In case of unsatisfactory performance, a penalty up to 10 % of total cost will be imposed.