

**Annex A: Terms of Reference
Korea/RFP/PSP/2021/005**

Development and Production of Direct Marketing Materials

UNHCR Private Sector Partnership in Korea

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1 INTRODUCTION

1.1 Background

UNHCR www.unhcr.org

UNHCR, the UN Refugee Agency, is the world's leading organization dedicated to saving lives, protecting rights, and building a better future for refugees. UNHCR operates in the field in over 134 countries, using its expertise to protect and care for refugees, returnees, internally displaced people, and stateless persons. UNHCR leads international action to protect people forced to flee their homes because of conflict and persecution. It delivers life-saving assistance like shelter, food, and water.

Global refugee situation: Forced displacement, most of it arising from war and conflict, has risen sharply in the past decade, largely a result of the Syria crisis, but also due to a proliferation of new displacement situations and unresolved old ones. Some 79.5 million people are today forcibly displaced, of which 26 million are refugees. On 17 December 2018, the United Nations General Assembly affirmed the [Global Compact on Refugees](#). The Global Compact on Refugees provides a blueprint for governments, international organizations, and other stakeholders including the private sector to ensure that host communities get the support they need and that refugees can lead productive lives.

Private Sector Partnerships (PSP) service: UNHCR is almost entirely funded by voluntary contributions from governments and private donors 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. In the last 13 years, UNHCR has grown its private sector income from USD 34 million in 2007 to USD 538 million in 2020.

1.1.1 Private Sector Partnership (PSP) in Korea

UNHCR started its Private Sector Partnership operation in Korea in 2009. Since the start of the operation, PSP Korea has been showing a record-breaking growth. In 2020, UNHCR Korea mobilized over USD 47 million, which represents approximately 10% of the global PSP annual income for 2020. The number of regular giving donors is over 230,000 and their financial contribution accounts for 80-90 % of total income. Since the engaged monthly donors are the backbone of UNHCR's refugee protection operation, it is PSP Korea's top priority to establish a long-lasting and strong partnership with donors who are truly engaged to the cause and get involved in refugee protection.

Enhancing LTV and donor loyalty through refined donor journey and diverse donor experience is critical to maintain a high volume of donors and sustainable growth. Therefore, it is imperative for PSP Korea to identify a competent external service provider who has knowledge and experience to create the market leading donor retention campaigns and relevant marketing materials for donor care purposes.

1.2 Statement of Purpose and Objectives

UNHCR Korea Donor Retention unit is seeking to appoint a competent in-country creative design service provider to provide design and production services on donor communication materials for two (2) years plus one (1) year extension upon satisfactory performance. The service provision will take place in Republic of Korea.

Phase 1: Aug 2021 - end Dec 2021

Phase 2: Jan 2022 - end Dec 2022

Phase 3: Jan 2023 - end Dec 2023

Phase 4: Jan 2024 - end July 2024

Service providers are expected to provide the services as described under point 2 – requirements. The corresponding technical proposal needs to follow the structure of point 2- requirements.

Please note: Below numbers are UNHCR PSP Korea's estimations based on its annual plan. Expected volumes and donors may vary during the duration of the contract. Suppliers are requested to indicate in their bids their maximum capacity and availability.

Supplier will be requested to maintain their proposed pricing structure for the duration of the contract. The Supplier is responsible for any unforeseen costs introduced by unexpected reasons. These are not to be passed along to UNHCR without explicit consent. The Supplier will be responsible for any new costs not captured in the contract. Any cost introduced after contract agreement should be mutually agreed.

1.3 Pre-selection criteria

Please note that compliance with the below listed set of criteria is mandatory. Failure to comply with any of them will result in disqualification.

1. The Supplier should be based in Republic of Korea; please submit **the company registration certificate** to establish compliance. In case of existing vendors to UNHCR Korea (i.e. having a vendor profile and has received purchase order already from UNHCR Korea), no need to submit the registration certificate, but please clearly indicate that your company is already registered on your technical proposal.

2 REQUIREMENTS

2.1 Direct marketing products

| Category | Material | Details/Specification |
|------------------------------|---|--|
| Year 5 Package | 5 th Anniversary package | Package reflecting UNHCR identity should be able to contain donor gift, donation certificate, and mini card |
| | 5 th Anniversary donation certificate | 1 page, rendezvous 210g, A5 (210*148mm), double-sided, color printing |
| | Mini card that explains the meaning of the gift package | 1 page, rendezvous 210g, A5 (210*148mm), double-sided, color printing |
| | 5 th Anniversary mobile card in <i>card news format</i> | 5-page mobile card, 3 buttons connected to external URL, report containing CTR, time, duration of the stay and the number of visitors should be submitted after release of mobile card (Please specify any other elements that can be analysed) |
| Year 10 Package | 10 th Anniversary package | Package reflecting UNHCR identity should be able to contain donor gift, donation certificate, and mini card |
| | 10 th Anniversary donation certificate | 1 page, rendezvous 210g, A5 (210*148mm), double-sided, color printing |
| | Mini card that explains the meaning of the gift package | 1 page, rendezvous 210g, A5 (210*148mm), double-sided, color printing |
| | 10 th Anniversary mobile card in <i>card news format</i> | 5-page mobile card, 3 buttons connected to external URL, report containing CTR, time, duration of the stay and the number of visitors should be submitted after release of mobile card (Please specify any other elements that can be analysed) |
| Year 1 Mobile card | 1 st Anniversary mobile card in <i>card news format</i> | 5-page mobile card, 3 buttons connected to external URL, report containing CTR, time, duration of the stay and the number of visitors should be submitted after release of mobile card (Please specify any other elements that can be analysed) |
| Donor Communication Material | 7 Steps Donor journey email | Seven consecutive, 1-page email with seven different themes for donors such as Registration, Water, Food, Shelter, Medication, Education, Livelihood. Final version should be submitted in PSD, JPG, HTML format. Photos, copies, and relevant design files will be shared. |
| | 7 Steps Donor journey mobile card | Seven consecutive mobile cards with seven different themes for donors such as Registration, Water, Food, Shelter, Medication, Education, Livelihood. Each mobile card will carry external link that is connected to a relevant thematic microsite for donors to visit and find out more. |
| Microsite | 7 Steps Donor journey microsite | Seven 1-page responsive microsites, each microsite describing seven different themes for donors such as Registration, Water, Food, Shelter, Medication, Education, Livelihood. |
| | Donor request submission page | A single page responsive microsite where donors can submit upgrade requests by leaving; name, phone number, email, and the amount of monthly donation that they wish to upgrade. Also provide a simple tick box to collect donor's consent in entrusting personal information to UNHCR. |
| | Event page | A single page responsive microsite to promote UNHCR event. On the same page donors should be able to apply for the event by leaving name, phone number, email, and birthdate. Also provide a simple tick box to collect donor's consent in entrusting personal information to UNHCR. |

| | | |
|-------------------------|----------------------------------|--|
| | Year-end receipt page | A single page responsive microsite to promote donors to register their personal information for Year-end tax receipt. On the same page donors should be able to submit their name, phone number, email, and Resident registration number. Also provide a simple tick box to collect donor's consent in entrusting personal information to UNHCR. |
| | Year-end Thank you page | A responsive landing page comprised of 5 inner frame contents. |
| Middle Donor Package | Thank you card | 2-page, A5 (210*148mm), double-sided, color printing, rendezvous 210g, envelope |
| | Mobile thank you card (optional) | 2-page mobile card, 3 buttons connected to external URL |
| Cash Appeal Direct Mail | One off donation pack | 6-8 page leaflet with specific theme, double-sided, color printing |
| Donor Gift Item | Donor gift A | Tumbler with UNHCR logo |
| | Donor gift B | Notebook with UNHCR logo |
| | Others | Others upon request |

2.2 Concept and creative development

- Provide graphic and copywriting proposals for the deliverables listed in 2.1
- Development of compelling creative concepts per copywriting, creative design, and innovative ideas.
- Note: in some cases, creative is adapted from packs developed by UNHCR HQ or other country offices, or from previously produced UNHCR Korea materials

2.3 Quantity

The estimate of quantities below is presented on a yearly basis for the sake of simplicity, but it should be noted that the actual quantities will not be evenly spread out over the year. Detailed schedules will be shared with the appointed supplier and is negotiable upon the agreement of both parties.

| Category | Material | Quantity | | | |
|------------------------------|---|--------------------|--------|--------|-------------------|
| | | 2021 (from Aug) | 2022 | 2023 | 2024 (to July) |
| Year 5 Package | 5th Anniversary package | 20,000 | 30,000 | 30,000 | 30,000 |
| | 5th Anniversary donation certificate | 20,000 | 30,000 | 30,000 | 30,000 |
| | Mini card that explains the meaning of the gift package | 20,000 | 30,000 | 30,000 | 30,000 |
| | 5th Anniversary mobile card in card news format | 1 | 1 | 1 | 1 |
| Year 10 Package | 10th Anniversary package | 2,000 | 3,000 | 5,000 | 5,000 |
| | 10th Anniversary donation certificate | 2,000 | 3,000 | 5,000 | 5,000 |
| | Mini card that explains the meaning of the gift package | 2,000 | 3,000 | 5,000 | 5,000 |
| | 10th Anniversary mobile card in card news format | 1 | 1 | 1 | 1 |
| Year 1 Mobile card | 1st Anniversary mobile card in card news format | 1 | n/a | 1 | n/a |
| Donor Communication Material | 7 Steps Donor journey email | 5 | n/a | n/a | n/a |
| | 7 Steps Donor journey mobile card | 5 | n/a | n/a | n/a |
| Microsite | 7 Steps Donor journey microsite | 5 | n/a | n/a | n/a |
| | Donor request submission page | 1 | n/a | n/a | n/a |
| | Event page | 1 | 1 | 1 | 1 |
| | Year-end receipt page | 1 | 1 | 1 | 1 |
| | Year-end Thank you page | 1 | 1 | 1 | 1 |

| | | | | | |
|----------------------|----------------------------------|--------------|--------------|--------------|--------------|
| Middle Donor Package | Thank you card | 1,000 | 1,100 | 1,200 | 1,300 |
| | Mobile thank you card (optional) | 1 | 1 | 1 | 1 |
| Cash Appeal DM | One off donation pack | 20,000 | 25,000 | 30,000 | 30,000 |
| Donor Gift Item | Donor gift A | 1,000 | 1,000 | 1,000 | 1,000 |
| | Donor gift B | 1,000 | 1,000 | 1,000 | 1,000 |
| | Others | upon request | upon request | upon request | upon request |

* Note: UNHCR Korea will provide relevant assets including UNHCR brand guidelines, draft copy and images, video files. Quantities for each gift package may change.

2.4 Timing for Implementation of Services

Please indicate in your technical proposal the time required for each expected deliverable listed in 2.1 direct marketing products. This should include all resource allocation needed from UNHCR, including any materials such as photos, videos, key messages, and key concept.

2.5 References

- UNHCR Brand Book including logo and colour usage is available at the following link for reference:
 - http://www.unhcr.or.kr/unhcr/files/pdf/UNHCR_BrandBook_Coulor.pdf
 - http://www.unhcr.or.kr/unhcr/files/pdf/UNHCR_BrandBook_KOR.pdf
- UNHCR contents and materials including photos and videos are available for search and reference at the following links:
 - www.unhcr.org (UNHCR's global homepage)
 - www.unhcr.or.kr (UNHCR Korea's official homepage)
 - blog.naver.com/unhcr_korea (UNHCR Korea's official blog)
 - media.unhcr.org (UNHCR's global media site)

3 CONTENT OF YOUR PROPOSAL

Please **DO NOT** include any financial information in your technical proposal. Including information on pricing in the technical proposal may lead to disqualification.

Your technical offer 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

It is considered essential for the agency to comply with the following requirements to participate in the RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score the company's (1) *experience as a creative design service provider on printed materials* and the (2) *experience as a creative design service provider on online/mobile materials*.

- Please confirm the Year founded
- Total number of projects over the last 3 years:
 - Experience as a creative design service provider on printed materials
 - Experience as a creative design service provider on online/mobile materials
- Please provide three client references that UNHCR will contact for background check in case of selection.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *the comprehensiveness of the proposal*; (2) *compliance regarding the required services listed under point 2, including the requested samples*;

| Category | Material | Related Requirements |
|------------------------------|---|---|
| Year 5 Package | 5th Anniversary package | <ul style="list-style-type: none"> • Please provide two (2) samples of successful creative pieces from past experiences that is most similar to <i>Year 5 and 10 Package</i>. • Sample format: printed material |
| | 5th Anniversary donation certificate | |
| | Mini card that explains the meaning of the gift package | |
| | 5th Anniversary mobile card in card news format | |
| Year 10 Package | 10th Anniversary package | n/a |
| | 10th Anniversary donation certificate | |
| | Mini card that explains the meaning of the gift package | |
| | 10th Anniversary mobile card in card news format | |
| Year 1 Mobile card | 1st Anniversary mobile card in card news format | n/a |
| Donor Communication Material | 7 Steps Donor journey email | <ul style="list-style-type: none"> • Please provide two (2) samples of successful creative email from experience that was |

| | | |
|----------------------|-----------------------------------|---|
| | | targeted for donor or customer retention |
| | | <ul style="list-style-type: none"> Sample format: jpeg or PDF |
| | 7 Steps Donor journey mobile card | n/a |
| Microsite | 7 Steps Donor journey microsite | <ul style="list-style-type: none"> Please provide one (1) sample of successful creative microsite Sample format: URL, if not applicable screen captured image in jpeg or PDF file |
| | Donor request submission page | |
| | Event page | |
| | Year-end receipt page | |
| | Year-end Thank you page | |
| Middle Donor Package | Thank you card | n/a |
| Cash Appeal DM | One off donation pack | n/a |
| Donor Gift Item | Donor gift A | n/a |
| | Donor gift B | |
| | Others | |

3.3 Personnel Qualifications (account management)

Account management is crucial for running a successful donor retention program. This section is dedicated to measure the proposed customer service towards PSP Korea 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 information of core staff who will be working on the account.
- Sufficient Account Management services to provide timely and efficient support for activities listed above.

3.4 Vendor Registration Form

If your company is not already registered with UNHCR, you should complete, sign, and submit the Vendor Registration Form (Annex C) with your technical offer.

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.

3.6 Applicable Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) and include the signed copy into your submitted Technical Proposal.

3.7 Financial Offer

Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown. Financial Offer must be submitted separately from the technical offer.

- Your separate Financial Offer must contain an overall offer in a single currency (KRW)
- The Financial Offer must cover all the services to be provided (price "all inclusive"). This also means that all application, license and permit related costs are to be borne by the vendor and included in the price proposal. Please use the attachment for any necessary supporting documents to help financial evaluation.
- UNHCR is exempt from all direct taxes and customs duties. With this regard, price must be given exclusive of all forms of tax.

- The cost of preparing proposals and of negotiating a contract, including any related travel, is not reimbursable nor can it be included as a direct cost of the assignment.
- Please review the details of your financial offer before submission. UNHCR is not responsible for any calculation errors or mistakes.

4 EVALUATION

Only the bids passing the pre-selection criteria will be considered for technical evaluation.

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. Suppliers must have a minimum technical threshold of 35 out of 60 points for the Technical Offer to be considered further in the financial evaluation process

| Company Qualifications (max 15 points) | Documents, information to be submitted to establish compliance with the set criteria. |
|--|--|
| General experience on the market (max 5 points) | The scores will be allocated for the number years providing services on the Korean landscape. |
| Experience providing design services on printed materials (max 5 points) | The scores will be allocated for the number of design project for printed materials currently on-going and/or completed (over the last 3 years). UNHCR Korea may request the companies to submit relevant evidence to prove their experiences. |
| Experience providing design services on online/mobile materials (max 5 points) | The scores will be allocated for the number of design project for online/mobile materials currently on-going and/or completed (over the last 3 years). UNHCR Korea may request the companies to submit relevant evidence to prove their experiences. |

| Proposed services (max 40 points) | Documents, information to be submitted to establish compliance with the set criteria. |
|---|--|
| Comprehensiveness of proposal (max 5 points) | Please follow the structure of requirements listed under section 2 to ease the scoring. General company profile will not be accepted as technical proposal. Please tailor your offer to demonstrate compliance with the listed requirements, and please provide as many details as possible. |
| Compliance with the requirements listed under 2.1 direct marketing products (max 20 points) | <p>Comprehensive proposal presented to prove capacity and capability to produce the direct marketing products listed under 2.1, Including the following samples:</p> <ul style="list-style-type: none"> Two (2) samples of successful creative pieces from past experiences that is most similar to Year 5 and 10 Package. Sample format: printed material. Please provide two (2) samples of successful creative email from experience that was targeted for donor or customer retention Please provide one (1) sample of successful creative microsite. Sample format: URL, if not applicable screen captured image in jpeg or PDF file <p><i>Without the requested samples, 0 point will be given.</i></p> |
| Concept and creative development section 2.2 (max 10 points) | A detailed section on the technical proposal to prove your company's compliance with point 2.2. |

| | |
|---|--|
| | <ul style="list-style-type: none"> Please provide two (2) samples from your past experience that prove your competence in concept/creative development. <p><i>Without the requested samples, 0 point will be given.</i></p> |
| Compliance with the requirements under 2.4 Timing for Implementation of Services (max 5 points) | Comprehensive proposal successfully listing and providing necessary details of timing for each expected deliverable listed under 2.1 |
| Personnel Qualifications (account management) (max 5 points) | Documents, information to be submitted to establish compliance with the set criteria. |
| Experience of core people who will work on UNHCR project. (Including experience with similar projects) (max 5 points) | The scores will be allocated based on the average years of relevant experience of the core people working UNHCR account. Please refer to section 3.3. |

4.1 Financial Evaluation

- The financial component is 40% of the total scores. The maximum number of points (40) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price.
- The comparison will be based on UNHCR's requirements. No optional services will be included.
- Companies can quote only in Korean Won. For evaluation purposes only, the offers submitted in currency other than US Dollars will be converted into US Dollars using the United Nations rate of exchange in effect on the date the submissions are due.