



A: Terms of Reference

PSP/IT/2021/007: Premium Acquisition MailPack and related services 2022-2024

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In 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 18,015 personnel is helping more than 82 million people in 132 countries. For more information, please see www.unhcr.org

UNHCR has an ambitious Private Sector Partnership (PSP) program which endeavours to capitalize on the income from the private sector.

Fund Raising activities in Italy include two different main programs: the Individual Giving (IG), raising contributions from individuals (including Mid Value Donor and High Value Donor) both regular and one-off, and the Private Partnerships and Philanthropy (PPH) targeting companies, foundations, Small and Medium Sized Enterprises (SMEs), High Net Worth individuals and Legacies.

IG programme is composed by two sub-programmes:

- **Acquisition**, aiming at recruiting new donors through a variety of channels including Face-to-Face, Prospect mailing, Digital and Multichannel, and
- **Donor Development programme**, aiming at increase donors' loyalty and value through direct mailing, Telemarketing and Donor care activities.

1.2 Statement of Purpose & Objectives

PSP Italy aims at enlarging even more one-off donors base through Acquisition Direct mailing campaigns.

For this reason, PSP Italy is in need to produce a Premium Acquisition MailPack, especially designed in order to acquire new one-off donors through the direct mailing channel, able to turn Acquisition mailing activity in one of the main acquisition channels.

Based on PSP Italy needs, the acquisition premium mail pack will be used also , for one-off donors reactivation purposes.

The purpose of the present RFP is therefore to select a specialized Agency, with possibility of up to two back up vendors, to support PSP ITALY in producing a Premium Acquisition MailPack in order to acquire new one-off donors and to reactivate lapsed ones through the direct mailing programme.

The selected Agency/ies will be responsible for ensuring the full service of the relevant activities, more specifically:

1. Creative development of the Premium Acquisition Mailpack;
2. Physical production of the Premium Acquisition Mailpack (print and gadgets);
3. Complete Mailing service (Servizio di Postalizzazione completo);
4. Provision of highly profiled lists of potential donors;
 - ⇒ The Premium Acquisition MailPack will be addressed to cold profiled lists (provided by the vendor), able to guarantee strong performances in terms of redemption rate (i.e. 2.5%) and average donation (i.e. 25€).
5. Campaign reporting and analysis.
6. Emergency appeal
7. Ancillary services such as propensity models, data enrichment, cluster analysis, strategic consultancy, etc..

The proposal has to be developed by providing the technical specifications of the above listed services

and accurately addressing the below described requirements and scenario.

At the conclusion of the present RFP, winning Agency/ies will enter into a Frame Agreement with UNHCR for an initial period of 1 year, tentatively starting in April 2022, with possibility of 1 (one) year extension for a maximum of 2 periods (1+1+1 years). Extension will be based on the results of the campaign and on UNHCR budget availability.

1.3 Technical specifications

Please find below technical specification of each service.

1.3.1 CREATIVE DEVELOPMENT

PSP Italy expects the selected Agency/ies to provide the complete creative development of the Premium Acquisition MailPack including:

- Concept development
- Graphic work
- Copywriting

Please note that the level of personalization required is very high. Each communication should reflect target information deduced from profiled lists in particular from indicators in possession of the supplier.

Be also aware of the fact that the mailpack MUST include items, such as (gadget, lift item etc...) which guarantee high redemption rates. The main purpose is to produce a premium mail pack, where the included items are highly engaging:

- gadgets should not be paper-made (such as keyrings, shoppers)
- lift items instead could be paper-made (such as greeting cards).

The pack may include both a gadget and a paper-made lift item or only one of the items.

1.3.2 PRODUCTION

PSP Italy expects the Agency to guarantee:

- **Physical production.** The service consists in printing and producing all the elements composing the Premium mailpack (such as letter, envelope, lift item, gadgets, etc...) and guaranteeing all the ancillary services.
- **Fulfilment and packaging.** The service aims at obtaining a final Premium Acquisition MailPack ready to be mailed.

1.3.3 COMPLETE MAILING SERVICE (SERVIZIO DI POSTALIZZAZIONE COMPLETO)

This may consist – but not necessarily be limited to – the following:

- ✓ “Omologazione” of the product for Postal fee chosen by PSP ITALY;
- ✓ Dispatching - booking of CMP (centro di meccanizzazione postale); delivery to CMP);
- ✓ Provision of the CMP delivery receipt;
- ✓ Conversion and normalization of files;
- ✓ Management of the entire process/activities concerning the relationship with Poste Italiane (such as information exchange with Poste Italiane focal points, indication of the best fee in relation to conventions existing between PSP ITALY and Poste Italiane, etc..).

1.3.4 PROVISION OF PROFILED LISTS OF POTENTIAL DONORS

Please find below the minimum required features that cold lists should have:

- Highly profiled;
- Concern high spending individuals with a good propensity to donate;
- Including at least postal address, better if phone number is available;
- Ensure a good acquisition average donation.

The number of profiled donors will be indicated by PSP Italy and will be based on the specific donor target identified and on budget availability.

1.3.5 CAMPAIGN ANALYSIS

PSP Italy requires the supplier to develop:

- **Monthly campaign monitoring analysis** → in order to understand actual results and progression of the campaign over the months;
- **Final campaign reporting and analysis** → to be conducted once the campaign is closed.

1.3.6 HUMANITARIAN EMERGENCY APPEAL

For the nature of its mission UNHCR faces natural and man-made humanitarian emergencies for which fundraising efforts are requested. In case a humanitarian emergency happens involving UNHCR, an emergency alert will be formally communicated to the supplier focal point by phone or e-mail; regardless of the day of the week (communication may happen on weekends or annual leave).

Normally when an Emergency arises, a DM Appeal is delivered promptly, in fact timely implementation of activities is crucial and a priority for fundraising activities.

The emergency pack should be basically composed by few elements in order to save time:

- 1) Letter + Donation form
- 2) Envelope.

Within 7 working days from the greenlight given by UNHCR, the Agency is expected to:

- Develop the concept of the emergency campaign, the creatives and the copywriting;
- Providing profiled lists for acquisition purposes;
- Develop the production, fulfilment and packaging;
- Manage the complete mailing service;
- Providing campaign analysis;
- Provide any of the ancillary services described in the below paragraph If needed.

1.3.7 ANCILLARY SERVICES

The supplier may be requested to develop the following ancillary services that could be required for reactivation purposes as well.

- Welcome pack for donor development purposes. This pack will be composed by:
 - Envelope
 - Letter (no donation form)
 - Personalized card
 - Leaflet
 - Compliment slip
- Follow up mailings aiming at ensuring their retention and cultivation in the coming years. The pack is composed by:
 - Envelope
 - Letter with donation form
 - Leaflet
- Data enrichment such as mobile phone number, e-mail, in order to guarantee the possibility to cultivate new one-off donors acquired through a multichannel approach;
- Propensity models on PSP Italy database, in order to improve the quality and the profiling of the lists provided to PSP Italy for the acquisition mailing campaigns;
- Cluster analysis on PSP Italy Database to provide strategic indications;

- Strategic consultancy requested during the contract period by PSP Italy;
- Any additional creative service such as concept development, graphic work and copywriting, linked to acquisition and reactivation activities, PSP Italy should need during the contract period.

Please consider that PSP Italy would like to deliver the Premium Acquisition MailPack to postal offices in early November of each year, starting from 2022. Based on the performance and results obtained, the Premium Acquisition MailPack may be reproduced in the coming years.

2 Requirements - IMPORTANT

In order to participate to the present tendering process and to be evaluated from a technical point of view, bidders are kindly required to:

- 1. Provide one creative proposal for a Premium Acquisition MailPack, developed in all its parts: from concept development, to graphic design and copywriting, based on a theme chosen by the bidder among stories of UNHCR refugees.**

Remember to provide the complete copywriting of all elements composing the Premium Acquisition MailPack, (such as Envelope, letter, leaflet, lift item).

Please consider that the theme chosen must be suitable for the acquisition purpose and replicable at any moment of the year.

The mailpack should be highly engaging in order to stimulate donations. Therefore, PSP Italy suggests to develop the mailpack including at least one not paper-made gadget and all the lift items the supplier considers helpful in order to maximize KPIs such as redemption rate and average gift.

The campaign's pay-off should be immediate, straight, and meaningful.

Use of images should be emotional, involving, touching. It should tempt the reader to go through the letter and read the message.

The tone of communication should be engaging and highly personalized. It should aim at identifying the donor with the cause of the organization and lead him/her to the choice of becoming part of it, making him/her feel able to make a real difference in the lives of many people.

Moreover, the copywriting should be inspiring, specific, focused on storytelling and have a "donor-centric" approach, which is the cornerstone of UNHCR communication style. In addition, it should convey the appeal sense of urgency.

Please note that copywriting, oriented toward the acquisition of new donors, should be the leading element of the creative structure, and built on a sapient usage of storytelling. It should bring the reader through a real story and emotionally involve him/her in order to stimulate the urgency to donate right at the moment the receiver reads the pack.

Please follow Copywriting indications as per Annex J. Copywriting Guidelines.

- 2.** The Agency should provide an emergency plan indicating:
 - A detailed timeline for the emergency appeal in section 1.3.6;
 - List of actions/activities to develop;
 - List of actions/activities the supplier expects PSP Italy to develop in order to respect the timeline;
 - References of the Emergency Account/Focal Point that should be available 24/7 – name, last name, e-mail, telephone number, etc.

Please describe, if any, innovative solutions, such as self-mailing (auto-imbustante), able to save time and promptly react in case a humanitarian emergency happens.

Please consider that PSP Italy expects the emergency pack to be delivered to the postal office within a maximum of 7 working days from the emergency green light.

Please also note that the submitted emergency plan will be integral part of the PSP Italy emergency plan that the supplier will be required to sign as a formal commitment.

- 3.** Provide examples of as-much-as-possible profiled lists of potential donors (i.e. with features described in paragraph 1.3.4 above) suitable for the specific acquisition purpose and for UNHCR cause. Please describe the proposed lists and provide indication on how the choice is made.

- 4.** Please provide and describe multiple examples/best cases (at least 2) of past Direct Mailing Acquisition campaigns followed/developed with premium mailpack. Information on the objectives reached, redemption, and average donation will be considered an asset. **Examples must be provided as PDF document.**
- 5.** Please describe how you would conduct analysis such as campaign monitoring and final campaign review, for this activity and also provide examples and description of analysis you have developed/supervised in the past for similar projects.
- 6.** Please also provide PSP Italy with some physical samples of Premium Acquisition MailPacks you have developed in the past in order to evaluate quality of paper, printing, gadgets and lift items.
- 7.** Please provide a timeline, indicating tasks and deadlines for service completion, considering the first week of November as the mailing service (postalizzazione) deadline.

Additional information for the development of the proposal.

Please find below some useful links where to find images, stories and other relevant information in order to develop your proposal:

- a) International website: <http://www.unhcr.org>
- b) Italian website: <http://www.unhcr.it>
- c) Website collecting refugees stories: <http://tracks.unhcr.org/>
- d) UNHCR's photo repository: <http://media.unhcr.org>

The financial offer (Annex B) will compare the unitary cost of a single Premium mailpack per different ranges of quantities.

When completing the financial offer, please be sure to have included in the unitary quotation of each pack, all the costs (1. creative development, 2. Production; 3. Complete Mailing service and 5. Campaign analysis) except for 4. Provision of profiled lists, 6. Emergency Appeal and 7. Ancillary services whose quotation should be separated.

3 Scenario

The Startup date is expected to be April 2022.

The Scenario of this document, as per quantities indicated in the financial form (Annex B), has to be used as a reference and can change according to PSP Italy needs and budget availability.

ACTIVITY	N. of Deliveries / Frequency per year	N. of pieces estimated per delivery
ACQUISITION MAILING SPECIAL PACK 1	1	20,000 - 49,999
ACQUISITION MAILING SPECIAL PACK 2	1	> 500,000
FOLLOW UP MAILING	2	5,000
WELCOME PACK	2	5,000
EMERGENCY PACK	1	35,000 - 50,000
PROPENSITY MODEL	2	n/a
CLUSTER ANALYSIS	2	n/a
STRATEGIC CONSULTANCY	50 hours	n/a
CREATIVE SERVICES	50 hours	n/a

Please note that PSP Italy expects prices to remain constant over the period of the Frame Agreement (1+1+1 years) even if quantities ordered will be less than those indicated in the financial form.

4 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:

4.1 Company Qualifications

- Company profile and company registration certificate (Iscrizione al registro delle imprese);
- Year founded;
- Office presence in Italy (if multi location company, specify headquarters location);
- Number of similar and successfully completed projects and/ or currently underway, especially with regard to printing services for direct mailing activities;
- Balance sheet and/or Last Audit Report;
- Self-certification that contracts are in line with the Italian law;
- “Documento unico di regolarità contributiva” (DURC);
- List of main clients;
- 3 relevant client references;
- Any information that will facilitate our evaluation of your company’s substantive reliability, financial and managerial capacity to provide the services.

Please note that experience in the no-profit sector as well as office presence in Italy are deemed important technical criteria.

4.2 Proposed Services

Please provide all the required documents/information listed in section 2 Requirements. Bidding companies are strongly encouraged to read carefully the requirements and submit a proposal that takes into consideration all of them

Physical sample(s) of the Premium Acquisition MailPack proposed in the offer must be delivered (by post or physical delivery) by **Monday 24th January 2022 h 17:00 CET** to the following address:

**UNHCR Office in Italy – Attn. Erika Celi
RFP PSP-IT-2021-007
Via Leopardi 24
00185 Roma (RM) – Italy**

4.3 Personnel Qualifications

Please provide short Curricula Vitae of the team members/ focal point(s) you propose to carry out the assignment, with clear evidence of number of years of experience.

4.4 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).

4.5 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.

4.6 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex H).

By acknowledging the Special Data Protection Conditions, selected supplier(s) represents and warrants that data is processed in accordance with Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and with any applicable laws and regulations.

The selected Agency/ies will be required to accept conditions expressed within the document "Letter of Appointment of the External Data Processor" (Annex I) and to sign it.

Important:

Please note that proposals should be prepared in English (or in English and Italian) while company's qualifications are accepted in Italian.

Campaign's materials, creatives, pay-off and copywriting should be in Italian.

For any additional information concerning further documentation to be submitted, offers evaluation, timing and modality to participate to the present tendering process please refer to the RFP document.

Please refer to Annex E for the check list before submitting all documentations in order to be sure you are proving all required documents.

5 Evaluation

5.1 Technical Evaluation

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

All bidders will be evaluated based on the below criteria:

Company Qualifications (max 22.5 points)	Documents, information to be provided to establish compliance with the set criteria
General Liability and Financial Stability of the Company (5%)	Scores will be allocated based on the documentation requested under section 4.1 "Company qualifications" and financial soundness.
Overall fundraising experience / time in business working in the not-for-profit sector (7.5%)	Scores will be allocated proportionally on the number of years of relevant experience in providing the services for non-profit clients.
Experience of completing similar projects (or currently in progress) internationally/Italy on direct mailing Acquisition campaigns, based on past acquisition campaigns results submitted (10%)	Scores will be allocated proportionally on the number of relevant projects developed or currently under development on mailing acquisition campaigns.
Quality of proposed Approach (max 42.5 points)	Documents, information to be provided to establish compliance with the set criteria
Comprehensiveness, quality and creativity of proposed services (concept development, graphic design and lift item) (7.5%)	Scores will be allocated on the understanding of the requirements as outlined in sections 1 and 2. Please tailor your offer to demonstrate compliance with the listed requirements.
Emergency Plan (5%)	Scores will be allocated based on quality and timing of the required services as outlined in section 1.3.6. and 2.2.
Quality of the proposed campaign analysis (5%)	Scores will be allocated based on the quality of the campaign analysis proposed based on section 2.5.
Quality of profiled lists (10%)	Scores will be allocated based on the number, quality, relevance and feasibility of the innovative projects proposed or developed in the past and related results.
Quality of proposed copywriting (10%)	Scores will be evaluated based on the proposed copywriting meeting the indications in Section 2.1 and on Annex J.
Quality of samples sent (5%)	Scores will be allocated based on the number and quality of sent samples.
Personnel Qualifications and experience (max 5 points)	Documents, information to be provided to establish compliance with the set criteria
Seniority and experience of the staff assigned to the project (5%)	Scores will be allocated proportionally on the number of years of relevant experience of the dedicated staff based on the information contained on the CVs.

The minimum passing scores of the evaluation is 49 out of 70; if a bid does not meet this minimum, it will be deemed technically non-compliant and will not be considered for the financial evaluation.

5.2 Financial Evaluation

Please provide your cost proposal for the project as per above requirements by filling in Annex B of this tender.

The financial component is 30% of the total score. The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price.

For any additional information concerning further documentation to submit, offers evaluation, timing and modality to participate to the present tendering process please refer to the RFP document.

Please refer to Annex E for the check list before submitting all documentations.

6 Customer Responsibilities

6.1 *UNHCR responsibilities*

UNHCR is responsible for providing and ensuring the following:

- Providing access to relevant data, resources and any information needed to the winning agency/ies to perform their duties. All data, resources and information will be provided as required under terms of strict confidentiality only to the winning agencies.
Providing all material and reference within agreed timelines and according to required specifications.
- Working in collaboration with the agency/ies, providing timely feedback and dedication to a collaborative and creative approach to project delivery.
- Appointing a dedicated project manager for each project;
- Providing support and all needed guidance in order to ensure smooth and timely communication between the supplier and offices participating in the project.
- Providing logos and brand book guidelines;
- Providing input on images/copywriting used by the supplier;
- Providing the list for reactivation mailing

7 Key Performance Indicators

7.1 *Performance Evaluation*

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis based on the following KPIs:

- Deadlines met within agreed timing;
- Quality of developed products according to given creative brief and UNHCR brand book;
- Support during the product development phase;
- Quality of copywriting according to UNHCR guidelines;
- Deep understanding of UNHCR needs and guidelines;
- Unit cost (production+lists)
- Redemption
- Average Donation