



Annex A: Terms of Reference
RFQ/22/007/RBAP/PSP
Provision of Lead Generation Services in the Philippines

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1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees was established on December 14, 1950 by the United Nations General Assembly. The agency is mandated to lead and coordinate international action to protect refugees and resolve problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It also has a mandate to help stateless people.

The Private Sector Partnerships (PSP) unit at UNHCR is tasked to maximise UNHCR's engagement with the private sector to mobilise support and resources for the refugee cause. In the Philippines, the PSP team started in 2014 and has since engaged over 44,000 individual donors contributing a total of US\$9M by the end of 2021.

Joining the league of emerging markets, the Philippine PSP team will contribute to the global goal to increase UNHCR's supporter base and build a sustainable funding stream from Filipinos while also increasing the level of awareness and engagement on the plight of refugees, stateless, and internally displaced persons in the Philippines and all over the world.

The Individual Giving (IG) programme is the lifeline of PSP's operation in this market. We present our work to the Filipino donor market to seek monetary contributions from individuals to support UNHCR's mandate to protect populations of concern in the Philippines and worldwide. More information can be found on www.unhcr.org/ph.

1.2 Statement of Purpose & Objectives

The PSP unit at UNHCR Philippines is looking to partner with a qualified agency to provide lead generation services to support campaigns in the Philippines and meet the KPIs of the campaign. The selected contractors are required to manage and implement lead generation activities and to help achieve the objectives.

Period: May 2022 – April 2024 (24 months, potentially extendable for a further period of 12 months subject to satisfactory performance)

Total leads requested: 5,000 leads (per 12 months)

The selected company must:

- Bring significant knowledge and experience of developing successful and qualified lead generation
- Have a proven track record of delivering successful campaign
- Have relevant experience of working with non-profit organisations
- Be able to work closely with staff of PSP Philippines and with key stakeholders across the UNHCR network in a collaborative and creative working environment
- Be able to optimise the campaign and performance to meet the KPIs

The successful bidder(s) will be requested to maintain their quoted price model for the duration of the contract.

Important: The budget allocated may vary and is subject to UNHCR's confirmation, through a Statement of Work (SOW) and purchase order (PO). Any adjustment on the number of leads shall be mutually agreed by UNHCR and the Contractor prior to the execution of the contractual service agreement and subject to revision during the contract duration.

2 Requirements

2.1 Core requirements

2.1.1 Account management, strategic media planning, reporting

- Provide overall account management including a dedicated account manager and team
- Maintain a robust analytics framework for lead generation campaigns
- Design and develop a lead generation strategy which achieves the objectives mentioned in Section 1.2
- Develop an annual media plan (with monthly iterations) which leverages a diverse set of lead generation strategies and channels to reach new audiences. Platforms to be tapped may include online and offline lead generation campaigns.
- Develop, propose, and roll out a creative testing plan, including optimising elements based on performance
- Provide ongoing strategic advice, optimisations, and media planning based on results; constantly optimise for the best possible Cost Per Lead (CPL), and Return on Investment (ROI), and adjust media plan accordingly
- Provide weekly campaign management reports and insights including all key media metrics and overall CPL and ROI, including recommendations for optimisation.
- Provide quarterly analysis reports assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of lead generation activities in previous quarter including detailed attribution tracking
- Participate in monthly meetings with UNHCR staff
- Continuously optimise, make adjustments and recommendations to digital marketing program in order to achieve digital fundraising objectives donation and audience expansion targets
- Provide advice and support on other digital projects and initiatives for the purpose of acquisition. This could include: Digital campaigns not related to the online acquisition program, mobile marketing solutions, emergency fundraising online

2.1.2 Lead targeting

- The agency is required to focus on committed giving donors who donate with credit cards
- The agency will generate qualified leads through digital marketing activities for UNHCR to follow up with lead conversion activity through email marketing and telemarketing. The agency is required to deliver qualified leads as below:
 - Male or Female, Filipino nationality only
 - Age over 25 years old, lives in the Philippines (subject to geo-targeting based on donor data)
 - Have first name, surname, email address, mobile number with opt-in agree to receive UNHC communication materials
 - Credit card holder

2.1.3 Media buying, implementation, and management

- Be responsible for the media buying strategy, planning, execution, and ongoing campaign management and analysis. It should develop and execute a results-oriented online media program incorporating best practices in the Philippine digital market.
- Provide creative approach and audience targeting strategies for paid social marketing and manage and optimise these channels.

- Provide best-practice reporting and analysis on online media performance, including reporting and recommendations on: landscape trends, advertising data, and conversion data.
- Optimise the online lead program towards financial targets, based on data. This will entail performance-based recommendations on the following: adjusting platforms and creatives, landing page optimisations (copy and images, content placement)
- Provide performance-based recommendations to UNHCR to test new digital marketing strategies for donor acquisition

2.1.4 Creative development

- Work with UNHCR to develop key message(s)/fundraising propositions which will appeal to the target audiences and reflect UNHCR's branding and areas of work.

2.2 UNHCR Responsibilities

UNHCR is responsible for:

- Working with the selected agency to develop a full project brief
- Preparing a periodic/quarterly Statement of Work (SOW) to specify project requirements and timelines, and budgets
- Ensuring that the process of export/import of data between UNHCR's database and the vendor's database will go easily, efficiently, and securely
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROIs to ensure high level results
- Streamlining reports submitted by the agency with UNHCR database reports and letting agency know of any required adjustment to reported figures
- Arranging regular meetings on progressions and deliverables of activities
- Providing creative materials
- Providing data on the outcomes of email marketing and telemarketing for lead quality and campaign optimisation
- Provisioning response mechanisms from call centre as requested by the vendor

UNHCR Assets

During project onboarding, UNHCR will share the following assets to the selected contractor:

- UNHCR Brand Book
- Updated Fact Sheet
- FAQ
- 2022 Communications Calendar
- Samples of local and global campaign assets on lead generation, email marketing and previous campaigns/projects

3 Content of the proposal and evaluation

Please make sure that you submit the necessary information to establish compliance with the below eligibility criteria. **The evaluation will be based on pass/fail (Yes or No) method.** Your technical proposal must be compliant with all the below listed:

- Please provide a description of your company with evidence of your company's capacity to perform the services required, including: company profile and registration certificate.
- Please specify location of the company's headquarters, and the branches that will be involved in the project.
- Please present a proven track record of delivering at least five (5) successful lead generation campaigns in Asia Pacific Region.
- Please provide information on at least one (1) client (current and/or previous) in the non-profit sector.
- Please confirm that your company is able to provide the requested volume of quality leads that meet the requirements detailed under 2.1 Core Requirements.
- Please present your strategy to generate the requested leads, covering all elements under 2.1 Core Requirements.
- Please provide at least three client references that UNHCR can contact during evaluation.

3.1 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).

3.2 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.

3.3 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.

3.4 Financial offer

Please use a single currency (PHP) to provide your fee structure and sum-up the total cost for the lead generation on Annex B.

UNHCR shall pay the vendor(s) within 30 days after satisfied completion of service requested. Payment shall be made against invoice and based on the quotation submitted by the vendor(s).

4 Key Performance Indicators

4.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier with the following KPIs:

	Expected outcomes (KPIs)
New Leads	<ol style="list-style-type: none"> 1. 100% deliverability rate for email (hard bounces / invalid emails will not be invoiced) 2. Minimum of 60% effective contact rate* on the provided list 3. Minimum of 3% targeted conversion to monthly donor
Account Management	Timely issuance of periodic reports

**Effective contact rate can be defined as 'talking to the specific donor and not i.e. leaving a message to a voicemail'*