

## **Terms of Reference**

### **PSP/IT/2024/003 Media Relations and PR services for fundraising for no profit in Italy**

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## 1. INTRODUCTION

### 1.1. Who we are

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 six decades, the agency has helped tens of millions of people to restart their lives worldwide. Today, UNHCR is one of the world's principal humanitarian agencies. Its staff is helping more than 110 million people in 135 countries. For more information, please see [www.unhcr.org](http://www.unhcr.org) or [www.unhcr.it](http://www.unhcr.it)

### 1.2. Overview and Objectives of this Request for Proposal (RFP)

The primary purpose of the UNHCR Private Sector Partnership (PSP) Unit in Italy is to generate income from individual donors, corporate and foundations, in order to sustain UNHCR activities worldwide. Fundraising activities in Italy includes two main programs: i) the Individual Giving (IG), raising funds from individuals and ii) Private Partnerships & Philanthropy (PPH) the targeting companies, foundations, Small and Medium Sized Enterprises, High Net Worth individuals and legacies.

It is widely recognized that the more familiar people are with an organization, the more likely they are to engage with this organization and offer their support. For UNHCR, brand growth remains therefore a priority in the short, medium and long term recognizing that public awareness and a positive image are critical for successful fundraising. Being trusted, making supporters feel like they are making a difference and keeping supporters informed, are the most important factors influencing likelihood to donate. It is also recognized that when communication activities around a theme or an emergency are carried out in an integrated, effective manner they generate communication peaks that result in increased donations. In particular, according to our analysis, TV still plays a key role in creating visibility peaks and increasing the number of donations.

To this purpose, the Fundraising Communication team, in close collaboration with the UNHCR Communication Unit in Italy, works to improve brand growth and to support and boost the Private Partnerships & Philanthropy (PPH) and Individual Giving (IG) fundraising efforts.

### 1.3. Scope of this RFP

By the present RFP, PSP Italy is seeking a **Media Relations and Public Relations (PR) Agency with high expertise and knowledge of fundraising/no profit Italian environment**, in terms of both knowledge of communication techniques for fundraising – i.e. SMS campaign, knowledge of the target audiences most inclined to donate etc – and also in terms of relations with the media, journalists, stakeholders, bloggers, influencers who are essential for positioning UNHCR as a leading actor in the world of humanitarian emergencies and supporting direct fundraising activities with communication activities.

Through this RFP, PSP Italy aims at appointing 2 agencies, a primary and a back-up supplier. The back-up supplier may be contacted in case the primary is unable to perform the services or to meet the communication objectives.

The selected agency/ies will work in close collaboration with the FR Communication Team and will help PSP in achieving the following specific objectives:

1. Strengthening UNHCR brand recognition especially in terms of being a leading agency in responding to large-scale humanitarian emergencies that result in millions of people fleeing their homes and country

2. Positioning UNHCR in Italy as a key player in providing life-saving assistance and identify durable solutions for persons under UNHCR mandate.
3. Amplify UNHCR fundraising messages on the digital world through the support of micro/medium influencers, content creators, communities, new media.

To this purpose, the selected Agency/ies will be required to provide specific support to:

- **ANNUAL SMS MULTICHANNEL CAMPAIGN**
- **PR ACTIVATIONS SUPPORTING DIGITAL FUNDRAISING CAMPAIGNS**
- **SPECIAL INITIATIVES**

## 2. EXECUTIVE SUMMARY and REQUIREMENTS

In summary, the proposal for Communication Activities is required by PSP Italy for a 2+1 year period, tentatively from **September 2024**, and has to be developed according to the following structure and related requirements:

- 2.1. Timing for production
- 2.2. Technical specifications
  - 2.2.1 Annual SMS multichannel Campaign
  - 2.2.2 PR activations supporting digital fundraising
  - 2.2.3 Special Initiatives
- 2.3 Scenario

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### 2.1. Timing for production

Please indicate for each activity the time required for the preparation, realization, conclusion and reporting of the services indicated below.

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### 2.2. Technical specifications

#### 2.2.1 Annual SMS multichannel campaign

The PR agency is requested to support PSP Italy in maximizing exposure, visibility, media outreach of the annual SMS multichannel campaign that is usually run every year for a duration of three weeks between January and February of each year. Developed with the essential support of partners such as RAI, SKY, Lega Serie A and others, for UNHCR Italy it is a priority because: it is an opportunity to talk about emergencies from a 'humanitarian' point of view to a wide audience; it ensures huge visibility for a limited budget and high income for low investment. Examples of past editions of successful SMS Campaign include:

- [Mettiamocelo in Testa](#) (2016, 2018, 2019, 2020 editions),
- [Fantastica Routine](#) (2021 edition),
- [Afghanistan Emergency](#) (2022),
- [Ukraine Emergency](#) (2023) and
- [Ferma il Gelo](#) (2024).

Core activities requested to the Agency include:

1. **Press office activities** including: preparation of a media strategy, creation and distribution of a press kit, possible promotion of a press conference, arrangement of interviews with UNHCR representatives and celebrities supporters if available, press review and analysis of results (press agencies, newspapers, magazines, TV, radio, web magazines);
2. **Placement** of fundraising campaigns on the main infotainment and entertainment programs of the TV national and local broadcasters (RAI, Mediaset, LA7, Sky, TV2000 and local broadcaster which could be of interest for UNHCR);
3. **Free adverts** published on local/national newspapers and other networks.
4. **Influencers, content creators and community relations.** For this service, three main activation levels are envisaged which could be implemented individually or all together. Please note that UNHCR does not remunerate digital influencers and also recommend agencies not to pay digital influencers. The financial offer should include only the following services:
  - a. Mass activation: engagement of micro-medium influencers, including: strategic advice, coordination with UNHCR media buyers, finetuning of target audience of influencers with the most relevant ones for UNHCR, influencers due diligence, mapping and analysis, risk assessment of possible reputational risks, dissemination of digital assets provided by UNHCR, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics)
  - b. Content creators: involvement of at least 1 content creator to be agreed with UNHCR, including: mapping of possible content creators to involve, analysis of key indicators such as for example: reach, engagement rate, quality of conversations, affinity with UNHCR values and mandate, affinity of target audiences; management of agreements, organisation of preparatory meetings, preparation of briefings for the production of materials, possible on-site supervision at live events, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics etc)
  - c. Communities: involvement of at least 1 community, which could be a new media, a branded content company or any other on line group which would be of interest for UNHCR purposes. Among the services which are requested: mapping of possible communities to involve, analysis of key indicators such as for example: reach, engagement rate, quality of conversations, affinity with UNHCR values and mandate, affinity of target audiences; management of agreements, organisation of preparatory meetings, preparation of briefings for the production of materials, possible on-site supervision at live events, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics etc).
5. **Result analysis and reports** of the above-mentioned services with all relevant KPI's is requested.

### 2.2.2 PR activations supporting digital fundraising

Over the course of the year, the FR COMM team supports the paid digital acquisition plan with 2 or 3 PR campaigns that we call '*activations*'. The themes are chosen on the basis of various aspects, such as:

- The fundraising best performer emergencies;
- the outbreak of new emergencies or the worsening of existing ones;
- the UNHCR's global strategy;
- the funding status of the various emergencies.

Approximately 3 activations per year are planned, with services to be defined according to previous fundraising performance.

For each activation, one or more of the below mentioned services may be activated:

1. **Press office activities**, including: creation and distribution of a press kit, arrangement of interviews with UNHCR representatives and celebrities supporters if available, press review and analysis of results (press agencies, newspapers, magazines, TV, radio, web magazines);
2. **Presence and visibility of the theme/emergency being activated** on the main infotainment and entertainment programs of the TV national and local broadcasters (RAI, Mediaset, LA7, Sky, TV2000, and any other national/local broadcaster which could be of interest for UNHCR) including: mapping of infotainment and entertainment programs, finetuning of target audience with the most relevant ones for UNHCR, arrangement of TV live interviews with UNHCR representatives/celebrity supporters and/or people of concern of UNHCR (refugees in Italy), preparation of press release, Q&A, factsheet and any other relevant materials for TV.
3. **Influencers, content creators and community relations**. For this service, three main levels are envisaged which could be implemented individually or all together. Please note that UNHCR does not remunerate digital influencers and also recommend agencies not to pay digital influencers. The financial offer should include only the following services:
  - a. Mass activation: engagement of micro-medium influencers, including: strategic advice, coordination with UNHCR media buyers, finetuning of target audience of influencers with the most relevant ones for UNHCR, influencers due diligence, mapping and analysis, risk assessment of possible reputational risks, advice on digital kit to be distributed to influencers, dissemination of digital assets provided by UNHCR, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics).
  - b. Content creators/Web celebrities: involvement of at least 1 content creator or web celebrity to be agreed with UNHCR, including: mapping of possible content creators and web celebrity to involve, analysis of key indicators such as for example: reach, engagement rate, quality of conversations, affinity with UNHCR values and mandate, affinity of target audiences; management of agreements, organisation of preparatory meetings, preparation of briefings for the production of materials, possible on-site supervision at live events, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics etc).
  - c. Communities: involvement of at least 1 community, which could be a new media, a branded content company or any other on line group which would be of interest for UNHCR purposes. Among the services which are requested: mapping of possible communities to involve, analysis of key indicators such as for example: reach, engagement rate, quality of conversations, affinity with UNHCR values and mandate, affinity of target audiences; management of agreements, organization of preparatory meetings, preparation of briefings for the production of materials, possible on-site supervision at live events, follow up, reporting including all the most relevant KPI's (reach, engagement rate, impressions, contents, analytics etc).
4. **Result analysis and reports** of the above-mentioned services with all relevant KPI's is requested.

### 2.2.3. Special initiatives

The PR Agency is requested to support UNHCR in case of specific initiatives, such as new corporate partnerships, relevant donations, World Refugee Day's events and any other activity which requires a media promotion or communication interventions to prevent or address possible reputational risks of UNHCR.

In these cases, two main levels of media relations are envisaged:

1. Medium level: development of a media communication strategy and media target definition; news and press releases drafting and distribution; organization of interviews; press review and analysis of results.
2. Advanced level: In addition to what is indicated in the medium level, the Agency will be requested: promotion of a press conference; preparation of position papers; creation and distribution of communication background material (Key messages, Q&A etc) and press kit; news adaptation according to different media needs; draft and update press releases.

Press review with report and all relevant KPI's will be essential and quotations shall include such press review and report.

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### 2.3. Scenario

Yearly periodicity of requested services is expected to be the following:

- **SMS campaign**: once a year (tentatively in February/first quarter of the year);
- **PR activations supporting digital fundraising** on Syria or other emergency: once a year (usually in March);
- **PR activations supporting digital fundraising** on summarization-food insecurity or other theme/emergency: once a year (July- August);
- **PR activations supporting digital fundraising** on Winter campaign: once a year (November – January).

In addition to the above, PSP Italy may estimate additional PR activations on other emergencies or special initiatives.

For all the above-mentioned initiatives, the duration of the services could be around 4 to 5 weeks.

Please note that PSP Italy can adjust and modify the activities planned in the course of the year and that the scenario can change on the basis of UNHCR priorities and budget availability. The above scenario cannot be considered as a commitment that UNHCR will purchase a minimum number of services.

## SECTION 3. CONTENT OF THE TECHNICAL OFFER

Your technical offer should be concisely presented and structured in the following order to include, but not necessarily be limited to the following information:

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### 3.1. Company Qualifications & Experience

- Company profile and company registration certificate (Iscrizione al registro delle imprese);
- Year founded;
- Office presence in Italy (if multi location company, specify headquarters location);



- Last Balance Sheet and / or last Audit Report;
- Self-certification that contracts are in line with the Italian law;
- Documento unico di regolarità contributiva (DURC);
- Number of similar/ relevant and successfully completed projects and/ or currently underway;
- List of main clients, including no-profit organizations;
- A minimum of three (3) references with contact details that we may contact from your current client list;
- 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

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### **3.2. Proposed Approach and Services**

- Please describe the services you propose to PSP Italy in order to meet the requests indicated in section 2.2. and the proposed approach for each of three areas requested.
- Please provide the timing required, as per section 2.1.
- Please provide examples of previous SMS campaigns and PR activations supporting digital fundraising
- Please provide example of previous reports issued at the end of PR services.

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### **3.3. Personnel Qualifications and Experience**

- Please provide Curriculum Vitae of core staff you propose to assign to the projects (maximum number of 5 short CVs).

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### **3.4. Vendor Registration Form**

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

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### **3.5. Applicable General Conditions**

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services by signing Annex D

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### **3.6. General Data Protection**

Please indicate your acknowledgement of the UNHCR of the UNHCR Special Data Protection Conditions by signing Annex E.

By acknowledging the Special Data Protection Conditions, selected supplier(s) represents and warrants that personal data managed by the supplier 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.

**Important:** Please note that proposals should be prepared in English or in Italian, while company's qualifications are accepted in Italian. Interested agencies shall present their offer for all the requirements included in the RFP (Annual SMS Campaign, PR activations supporting digital fundraising and Special Initiatives). Submission for only part of the services will not be considered.

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 Cover Letter.



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

## SECTION 4. EVALUATION

### 4.1. Technical Evaluation

The **Technical offer** will be evaluated using 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.

<b>Company Qualifications (max 30 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
General Liability and Financial Stability of the Company (5%)	Please submit the company registration certificate, a company description, the DURC and the last balance sheet or audit report
Overall relevant experience / time in business (10%)	Scores will be allocated proportionally on the number of years of relevant experience in providing the services
Experience of working in the communication for fundraising for not-for-profit sector (15%)	Scores will be allocated proportionally on the number of years of experience in the no-profit sector and on the number of non-profit clients.
<b>Quality of proposed Approach (max 30 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
Comprehensiveness and clarity of submitted approach and proposal (5%)	Scores will be allocated on the understanding of the requirements as outlined in sections 2.2.1 and 2.2.2. and 2.2.3. Please tailor your offer to demonstrate compliance with the listed requirements.
Quality and relevance of past PR services (10%)	Scores will be allocated proportionally based on the number, the quality and relevance of the past projects. Projects developed in the not-for-profit sector will be an asset.
Quality of proposed services (10%)	Scores will be allocated on the quality of the approach as outlined in sections 2.2.1, 2.2.2, 2.2.3
Quality of reporting (5%)	Please provide one or more sample of reporting produced at the end of past projects. Scores will be allocated based on the information and data available in the report.
<b>Personnel Qualifications and experience (max 10 points)</b>	<b>Documents, information to be provided to establish compliance with the set criteria</b>
Seniority and experience of the staff assigned to the project (10%)	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 proceed to the financial evaluation.

### 4.2. Financial Evaluation

Please provide your cost proposal as per above requirements by filling in Annex B of this tender. No other format will be accepted.

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.

## **SECTION 5. Key Performance Indicators**

UNHCR will monitor the performance of the selected supplier/s after each campaign. Key Performance Indicators (KPIs) will be set for each campaign in collaboration with the chosen agency and these will be the indicators that will be monitored together. Among KPIs, UNHCR may include the following:

- Media coverage;
- Media reach;
- Advertising Value Equivalent, when possible
- Reach of digital PR activities
- Engagement rate of digital PR activities

Selected Agency/ies will be required to submit a report at the end of each campaign, with results on the above KPIs.