

Annex A: Terms of Reference  
RFP/2016/812  
Request for Proposal for the Development and Execution of Public Engagement  
Campaigns

## Table of Contents

<b>1</b>	<b>Introduction.....</b>	<b>3</b>
1.1	Background.....	3
1.2	Statement of Purpose & Objectives .....	5
<b>2</b>	<b>Requirements.....</b>	<b>7</b>
2.1	Core requirements.....	7
2.1.1	Concept development:.....	7
	Development of global, adaptable creative concepts for public engagement and lead generation activities. ....	7
2.1.2	Production of the accompanying creatives:.....	7
	Such as videos, on-line platforms and/or whatever is required, this must be easily adaptable for different countries. ....	7
2.1.3	Production of assets: .....	7
2.1.4	Development and production of supporting on boarding/conversion and follow up assets. 7	
2.2	Other services, required for the performance of the key requirements.....	8
2.3	Scenario.....	8
2.4	Customer Responsibilities .....	8
<b>3</b>	<b>Content of the Technical Offer.....</b>	<b>9</b>
3.1	Company Qualifications.....	9
3.2	Proposed Services .....	9
3.3	Personnel Qualifications.....	9
3.4	Vendor Registration Form .....	9
3.5	Applicable General Conditions .....	9
<b>4</b>	<b>Evaluation .....</b>	<b>10</b>
4.1	Technical Evaluation .....	10
<b>5</b>	<b>Key Performance Indicators .....</b>	<b>11</b>
5.1	Performance Evaluation .....	11

# 1 Introduction

## 1.1 Background

**UNHCR [www.unhcr.org](http://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 125 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.

UNHCR helps safeguard fundamental human rights and develop solutions that ensure people have a safe place to call home where they can build a better future.

### **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 65.3 million people are today forcibly displaced, of which 21.3 million are refugees who have been forced to flee across international borders, and the rest are people displaced within their own countries.

### **Private sector partnerships:**

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In 2016, UNHCR needs USD 7.067 billion for its global work. This amount is set to grow with current conflicts fuelling displacement.

UNHCR has the fastest growing international private sector fundraising programme in the world with ambitious targets. By 2018 UNHCR aims to raise US\$500 million from 2.5 million donors and to have 5 million supporters.

In 2015 private sector fundraising contributed 8% to the overall budget of the organisation with the rest coming from governments. UNHCR has private sector fundraising programmes in 27 countries.

In six of these countries, UNHCR has partnerships with independent charitable organizations (known as: National Partners). National Partners raise funds for UNHCR and awareness of the refugee cause. They use the UNHCR brand for fundraising purposes and engage directly with donors. UNHCR National Partners operate in: Australia (Australia for UNHCR), Germany (UNO Flüchtlingshilfe), Japan (Japan for UNHCR), Spain (España con Acnur), Sweden (Sweden for UNHCR) and the USA (USA for UNHCR)

### **Examples of some existing UNHCR public engagement campaigns:**

This is a relatively new area for UNHCR but there is great potential for development particularly with the current spotlight on refugee issues. The organisation is looking to

position all public engagement activities under the over-arching theme of *standing with refugees* and building on the empathy and compassion that the public have shown for them. The organisation now has a goal of ensuring a meaningful 'Global Compact for Refugees' is signed by governments in 2018.

The following are some examples of recent and current campaigns and public engagement activities.

### **1. Nobody Left Outside: current global fundraising campaign**

UNHCR launched the Nobody Left Outside campaign ([www.nobodyleftoutside.org](http://www.nobodyleftoutside.org)) in May 2016. It is the first ever global fundraising campaign for UNHCR bringing together multiple fundraising markets around the common theme of shelter.

The campaign aims to raise enough to shelter two million refugees by 2018. It also aims to increase UNHCR brand awareness and generate 1.5 million new contacts through a public engagement campaign/s.

There are 20 countries fundraising for the campaign over three years, engaging various donor types including individuals, philanthropists, foundations, and corporations. Those confirmed as taking part in the campaign so far are: Australia, Canada, Hong Kong, Italy, Greece, South Korea, Netherlands, Philippines, Sweden, Thailand, Singapore, France and Monaco, The Gulf States, Indonesia, Japan, Switzerland, UK and USA.

These countries are employing multiple channels including; direct mail, e-mail, direct response TV advertising, outdoor advertising, digital advertising, face-to-face fundraising, inserts, SMS appeals and telemarketing.

### **2. #WithRefugees**

UNHCR's #WithRefugees campaign ([www.withrefugees.org](http://www.withrefugees.org)). This was a global petition delivered to UN headquarters in New York ahead of the UN General Assembly meeting on 19 September. The #WithRefugees campaign has now been extended and will run until a global compact is signed in 2018. It is therefore likely that there will be additional public engagement campaigns for #WithRefugees.

### **3. Some successful regional examples:**

<https://voices.unhcr.org/syria>

<https://www.youtube.com/watch?v=O0ndziaggtQ>

<https://www.unhcr.org/th/namjai4refugees/en>

### **4. Some global examples using UNHCR celebrity support (GWA)**

<http://www.unhcr.org/refugeeday/what-they-took-with-them/#WithRefugees>

supporting

<https://www.youtube.com/watch?v=gd9BE7crEoc> supporting #NobodyLeftOutside

---

## **1.2 Statement of Purpose & Objectives**

---

**UNHCR is seeking to enter into a Frame Agreement contract with Agencies specialized in public engagement/lead generation through digital channels.**

UNHCR is seeking an agency (or agencies) to develop multiple public engagement campaigns for the organization. The purpose of engaging the public is to encourage participation in advocacy campaigns and/or to gain new leads (email addresses and telephone numbers) for conversion to donors. This engagement will be primarily via digital channels.

The Frame Agreement will be signed with the successful bidder(s) for three (3) years.

**The first project for the agency:**

Will be to develop an effective digital lead generation activity to meet the target of generating 1.5 million new leads (phone numbers as a priority and email addresses as a secondary objective) globally for the Nobody Left Outside campaign (as outlined above under point 1.1.1).

The agency appointed will be given significant creative freedom. However, the concept for this activity must be adaptable for different countries and therefore, must have global appeal.

As well as generating a high volume of leads the activity must also generate a high quality of leads, meaning that they have the financial means to convert well when asked for a donation.

The activity should also raise the profile of UNHCR and to build understanding and empathy for refugees. The concept must also meet UNHCR messaging requirements as laid out in the organisation's Brand Book.

**Similar activities to emulate:**

[www.globalrichlist.com](http://www.globalrichlist.com) – for Care International - a good example of putting the potential donor at the centre

<http://www.cancerresearchuk.org/support-us/citizen-science> - CRUK - a good example of a meaningful collaboration with an organization to make a real change

<https://www.youtube.com/watch?v=nDuM7758SXI> – UNICEF's social experiment, a good example of using good video content

<https://www.youtube.com/watch?v=RBQ-loHfimQ> – Save the Children's most shocking second a day video, another good example of the effect of excellent video content

<https://www.youtube.com/watch?v=vFXWIArfQ80> - Hashtag killer campaign (first world problems) for Water is Life – a good example of fresh and bold content that can be adapted for all social media

[https://www.youtube.com/watch?v=2\\_M0SDk3ZaM](https://www.youtube.com/watch?v=2_M0SDk3ZaM) – Another example of bold content from UNICEF

<http://www.digitalbuzzblog.com/unicef-donate-a-word-campaign/> - good example of platform partnership

<https://www.youtube.com/watch?v=XaDb64QGmbs> - Colombian League Against Cancer - Cancer Tweets, a good example of innovation

## 2 Requirements

---

### 2.1 Core requirements

---

#### 2.1.1 Concept development:

Development of global, adaptable creative concepts for public engagement and lead generation activities.

#### 2.1.2 Production of the accompanying creatives:

Such as videos, on-line platforms and/or whatever is required, this must be easily adaptable for different countries.

#### 2.1.3 Production of assets:

Production of adaptable assets to support the promotion of public engagement activities across digital channels, including, but not limited to; Facebook, Twitter, e-mail, SEM, display ads and website landing pages.

#### 2.1.4 Development and production of supporting on boarding/conversion and follow up assets.

**Features that any public engagement/lead generation activity must include:**

- Easy to execute to achieve a high volume of leads
- Generate quality leads who will convert well to donors
- It must have a built-in donor on-boarding and follow-up strategy with accompanying assets to convert leads to donors and then retain them
- Creative concepts should be adaptable to lead generation/advertising formats across the main digital channels, including Facebook, Twitter, email, SEM, display advertising and local digital platforms such as Line in Asia.
- Creative concepts must be adaptable for different languages and cultural contexts as they will be used in up to 20 different countries from Asia, Australia, Europe, Americas, Middle East and North Africa
- It must support UNHCR's key brand attributes which are that we get things done, make a difference in people's lives and can be trusted
- Strong storytelling which captures imaginations
- Fresh and bold content
- Giving people the power to have direct influence
- They should educate and foster an environment of understanding and empathy with refugees
- Be digitally led – made for a digital audience in terms of style, length, share-ability etc.
- Where directed, include celebrity participation, both in terms of the creatives but also in terms of related online promotion and PR

**Activities could also:**

- Use corporates for micro-donations e.g. e-commerce and on-line ticketing sites, partner would integrate a call to action to make micro donation or provide contact details. Although this is obviously dependent on a corporate partner and would need to be led by them.
- Utilise celebrity involvement to engage public audiences in key markets

---

## ***2.2 Other services, required for the performance of the key requirements***

---

Agencies are expected to:

- Bring significant knowledge and experience of developing successful public engagement and lead generation activities in multiple countries and have developed a sector-leading reputation for these initiatives
- Work closely with senior staff in the Private Sector Partnership service (PSP) and with key stakeholders across UNHCR to development public engagement campaigns in a collaborative and creative working environment
- Have the capacity to adapt creatives as needed once live testing of any public engagement activity begins
- Be able to demonstrate experience of developing celebrity related products

---

## ***2.3 Scenario***

---

The agencies will be expected to work on between two (2) and four (4) global public engagement campaigns per annum. However, in the financial offer please provide the cost for only one campaign as directed under point 3.2 Proposed Services.

---

## ***2.4 Customer Responsibilities***

---

The UNHCR is responsible for providing the following:

- If in the Statement of Work (SoW) and purchase order (PO) resulting from the RFP travel is requested, UNHCR shall reimburse travel expenses. Travel and terminal expenses incurred by the Contractor's personnel shall be reimbursed by UNHCR in the amount of the actual expenses incurred by the Contractor's personnel as evidenced by original supporting document, provided however that UNHCR shall not be liable to reimburse travel expenses incurred in excess of the amount indicated in the relevant purchase order. The maximum amount permitted for travel in any purchase order shall be based on the cheapest economic airfare available as determined by the UNHCR Travel Unit.
- Access to PSP financial data, supporter data and fundraising results will be provided as required under terms of strict confidentiality only to the winning agencies.
- Meeting deadlines for approvals set in collaboration with the agency, providing timely feedback and dedication to a collaborative and creative approach to project delivery.



## 3 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:

---

### 3.1 Company Qualifications

---

- A description of your company with evidence of your company's capacity to perform the services required, including:
  - Company profile,
  - Registration certificate
  - Last audit reports
- If a multi-location company, please specify the location of the company's headquarters, and the branches that will be involved in the project work with founding dates;
- Examples of similar projects with results
- Number of similar projects currently underway
- Any relevant experience working with non-profit organizations preferably in a number of different markets
- You are requested to provide three (3) references that we may contact from your current client list

---

### 3.2 Proposed Services

---

- An outline of your approach to the **first project listed under point 1.2**, which is the lead generation activity as part of UNHCR's Nobody Left Outside campaign
- A draft or a number of draft concepts for this first project
- A quotation of the cost for this **first project only which is the lead generation campaign for "Nobody Left Outside"**, the lead generation activity development
- Demonstration that you have taken into account all the factors listed under Requirements in proposing your approach to this first project under point 1.2.

---

### 3.3 Personnel Qualifications

---

A list of the core staff to be assigned to this project with a brief biography for each.

---

### 3.4 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).

---

### 3.5 Applicable General Conditions

---

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) including it in your submitted Technical Proposal.

## 4 Evaluation

### 4.1 Technical Evaluation

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

The technical evaluation will consist of two phases.

During the first phase of the evaluation, all bidders will be evaluated based on the below criteria and only those bidders reaching a minimum of 35 points out of 55 will be shortlisted for the second phase of the evaluation:

1 <sup>st</sup> part of the evaluation		
1. Company Qualifications	<ul style="list-style-type: none"> <li>- Overall experience/time in business</li> <li>- Experience of conducting similar projects</li> <li>- Experience of working in the not-for-profit sector</li> <li>- Experience of working in a number of different countries</li> </ul>	22.5
2. Quality of service	<ul style="list-style-type: none"> <li>- Comprehensiveness of submitted written proposal</li> <li>- Quality/ Creativity of proposed concepts and all other services offered</li> </ul>	25
3. Project staff	<ul style="list-style-type: none"> <li>- Seniority and experience of the staff assigned to the project, based on written submission</li> </ul>	7.5
Total 1+2+3		55

Shortlisted agencies will be asked to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via WebEx. This is expected to be one hour maximum. This presentation will form part of the second phase of the technical evaluation.

2 <sup>nd</sup> phase of the evaluation		
4 Quality of presentation	<ul style="list-style-type: none"> <li>- Quality and clarity of the presentation at the WebEX;</li> <li>- Experience of core people who will work on the project, based on WebEX</li> </ul>	15

The minimum passing scores cumulatively from first and second phase of the evaluation is 42 out of 70; if a bid does not meet these minimums it will be deemed technically non-compliant and will not proceed to the financial evaluation.

Bidders with technically compliant proposal only, can advance to the financial evaluation phase.

The Financial offer will use the following percentage distribution: 30% from the total score.

The maximum number of points will be allotted to the lowest price offer that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price; e.g., [total Price Component: 30] x [US\$ lowest offer]/ [US\$ other offer] = points for other supplier's Price Component.

## 5 Key Performance Indicators

---

### ***5.1 Performance Evaluation***

---

UNHCR will monitor the performance of the selected supplier on a regular basis throughout each activity. Key Performance Indicators (KPIs) will be set for each public engagement campaign in collaboration with the chosen agencies and these will be the indicators that we will monitor together. Among KPIs, UNHCR may include the following:

- Numbers of leads generated;
- Timely delivery of concepts and creatives;
- Conversion rates.