

Terms of Reference
UNHCR Public Sector Partnership (PSP)
Printing and Production services for Direct Mailing and Other activities

Table of Contents

| | | |
|----------|--|-----------|
| 1 | INTRODUCTION..... | 3 |
| 1.1 | Background | 3 |
| 1.2 | Scope of this RFP | 3 |
| 2 | EXECUTIVE SUMMARY | 4 |
| 2.1 | General Background | 4 |
| 2.2 | Technical specifications | 4 |
| 2.2.1 | LOT A) Special and Emergency appeals + Newsletter | 5 |
| 2.2.2 | LOT B) Print and daily fulfilment of Welcome Pack and Thank you pack | 9 |
| 2.2.3 | LOT C) Donor Care and PPH materials | 11 |
| 2.3 | Technical notes | 14 |
| 2.4 | Secure transmission of personal data | 14 |
| 2.5 | Scenario | 15 |
| 3 | REQUIREMENTS - IMPORTANT: | 16 |
| 3.1 | Technical proposal requirements | 16 |
| 3.2 | Innovation | 17 |
| 4 | Content of the Technical Offer | 18 |
| 4.1 | Company description and company’s qualifications: | 18 |
| 4.2 | Proposed services: | 18 |
| 4.3 | Proposed personnel | 18 |
| 4.4 | Vendor Registration Form: | 18 |
| 4.5 | UNHCR General Conditions for Provision of Services: | 18 |
| 5 | EVALUATION..... | 19 |
| 5.1 | Technical evaluation | 19 |
| 5.2 | Financial Evaluation | 20 |
| 6 | Customer Responsibilities | 21 |
| 7 | Key Performance Indicators..... | 22 |

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. Their staffs of more than 16,000 personnel are helping 68.5 million people in 138 countries. For more information, please see www.unhcr.org

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

Fund Raising activities in Italy include two different main programs: i) the Individual Giving and Marketing (IG&M), raising money from individuals both regular and one-off, and ii) the Private Partnership & Philanthropy (PPH) targeting companies, foundations, Small and Medium Sized Enterprises (SMEs), High Net Worth individuals and Legacy.

IG&M program is composed by two sub-programs: i) Acquisition, aiming at recruiting new donors through a variety of channels including Face-to-Face, Direct Mailing, Digital and Multichannel, and ii) Donor Development program, aiming at increasing donors' loyalty, value and retention through the Donor Care and the Donor retention program.

In order to boost contributions to the Organization and achieve longer-term income goals, PSP Italy is now seeking for high-qualified printing/production supplier(s) in order to support the Organization in producing Direct mailing, Donor Care and PPH materials.

1.2 Scope of this RFP

The purpose of the present RFP is to establish a frame agreement with multiple suppliers to support UNHCR in printing effective and attractive materials for both the IG&M and PPH program. Materials will be used in different channels, in order to:

- Support fundraising activities addressed to existing donors (one-off and regular) and lapsed donors;
- Support acquisition of new donors.

2 EXECUTIVE SUMMARY

2.1 General Background

The RFP is divided in 3 different lots (parts) based on different service typology:

LOT A) Special and Emergency appeals + Newsletter

LOT B) Print and daily fulfilment of Welcome pack and Thank you pack

LOT C) Donor are and PPH materials

Suppliers can apply to just one Lot (for example only Lot A), some (for example Lot A and Lot C) or all of them (Lot A, B, C), depending on the level of expertise of each bidder for the different service typology.

The proposal for printing/producing attractive Direct Mailing and other activities materials is required by PSP Italy for a 2 years period with possibility of 1 year extension.

PSP Italy would like to appoint up to three (3) suppliers, a primary and up to two back-up suppliers, per each Lot.

2.2 Technical specifications

Please find in next chapters, list and technical features of items that PSP Italy normally print and produce during the year (divided per lot). Please also consider that all formats and features may vary and change, during the contract period, according to PSP Italy necessities and fundraising needs.

2.2.1 LOT A) Special and Emergency appeals + Newsletter

A. Special appeals

It is a direct mailing activity addressed to existing one-off or regular donors (including Middle donors) for donor retention, development and donor care purposes or to cold lists for acquisition purposes.

Special appeals pack may include all or just some of the items listed below.

In addition, from time by time, PSP Italy could request the vendor to add to the basic pack gadget and lift items such as greeting cards, wrapping paper, etc., for which specific request for quotation will be addressed.

| EXISTING ONE-OFF & REGULAR DONORS APPEAL | |
|--|---|
| LETTER + DONATION FORM | |
| Dimension: | Open 42 x 29.7 cm closed 21x10 cm Letter 21 x 29.7 + donation form 21x29.7 |
| Paper: | Uncoated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| TAX LETTER | |
|------------|---|
| Dimension: | 21 x 29,7 cm closed 21x10 cm |
| Paper: | Uncoated paper - laser FSC mix 90 gr/mq |
| Colours: | 4+4 |

| ENVELOPE | |
|------------|--------------------------------------|
| Dimension: | 12 x 23 cm with a window on the back |
| Paper: | Uncoated paper - FSC mix 80 gr/mq |
| Colours: | 4+4 |

| RETURN ENVELOPE | |
|-----------------|-----------------------------------|
| Dimension: | 10.5 x 21.5 cm no window |
| Paper: | Uncoated paper - FSC mix 70 gr/mq |
| Colours: | 1 color |

| FLYER 1 | |
|------------|--------------------------------------|
| Dimension: | Open: 42 x 12 cm, Closed: 21 x 10 cm |
| Paper: | Uncoated paper - FSC mix 90 gr/mq |
| Colours: | 4+4 |

| MIDDLE DONORS APPEAL | |
|----------------------|---------------------------------------|
| LETTER | |
| Dimension: | open cm 42 x29,7 closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| ENVELOPE | |
|------------|-----------------------------------|
| Dimension: | 17 x 25 cm no window |
| Paper: | Uncoated paper - Fsc mix 80 gr/mq |
| Colours: | 2+2 |

| RETURN ENVELOPE | |
|-----------------|-----------------------------------|
| Dimension: | 10.5 x 21.5 cm no window |
| Paper: | Uncoated paper - Fsc mix 70 gr/mq |
| Colours: | 1 color |

| DONATION FORM | |
|---------------|---------------------------------------|
| Dimension: | 21 x29,7 cm closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| FLYER WITH CARD | |
|-----------------|------------------------------------|
| Dimension: | 21 x 29.7 cm closed 21x14,8 cm |
| Paper: | Matte coated paper - Fsc 300 gr/mq |
| Colours: | 4+4 |

| BROCHURE 1 | |
|------------|--|
| Dimension: | open 30 x 21 cm 16 pages closed 21x14,8 cm |
| Paper: | Matte coated paper - Fsc 150 gr/mq |
| Colours: | 4+4 |

| CARD | |
|-------------------|---|
| Dimension: | The card format is 8,56 x 5,40 thickness 0,76 and they are printed on both sides, 2 colors on BIO PVC |
| Paper: | BIO PVC |
| Colours: | 2+2 |

| THANK YOU CARD | |
|-----------------------|------------------------------------|
| Dimension: | A6 (cm 14,8x10,5) |
| Paper: | Matte coated paper - Fsc 300 gr/mq |
| Colours: | 4+4 |

| FLYER WITH BUSINESS CARD | |
|---------------------------------|-----------------------|
| Dimension: | 21x15 cm |
| Paper: | Acroset FSC 150 gr/mq |
| Colours: | 4+4 |

| BUSINESS CARD | |
|----------------------|-----------------------|
| Dimension: | 8,5x5,5 cm |
| Paper: | Splendorgel FSC 300gr |
| Colours: | 4+0 |

| BROCHURE 2 | |
|-------------------|---------------------------------------|
| Dimension: | 42 x29,7 cm closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| PROJECT PROPOSAL. It contains main information on project, target, objectives and main outcomes. | |
|---|---------------------------------------|
| Dimension: | 21 x29,7 cm closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| PREMIUM ELEMENT - the lifting item included to boost donations. It works as a thank you or rewarding element. | |
|--|--|
| Dimension: | 21 x29,7 cm closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 200 gr/mq |
| Colours: | 4+0 |

| BROCHURE 3 | |
|-------------------|--|
| Dimension: | 49.4x42 cm open closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 300 gr/mq |
| Colours: | 4+4 |

| DONATION REPORT | |
|-------------------|--|
| Dimension: | 21X29 closed 21x14,8 cm |
| Paper: | Matte coated paper - FSC OCR 300 gr/mq |
| Colours: | 4+0 |

B. Emergency appeals

UNHCR sometime faces some type of emergencies both natural and man-made.

In case a humanitarian emergency involving UNHCR occurs, an emergency alert will be formally communicated to the supplier focal point by phone or email.

The most common activity PSP Italy implements once the Emergency has arisen is the Special appeal. For this reason, it is very important that printing process management and subsequent delivery to the Postal Office is smart and smooth. Emergency appeals are composed by:

| LETTER + DONATION FORM | |
|------------------------|--|
| Dimension: | Open 42 x 29.7 cm closed 21x10 |
| | Letter 21 x 29.7 + donation form 21 x 29.7 |
| Paper: | Uncoated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| ENVELOPE | |
|-------------------|--------------------------------------|
| Dimension: | 12 x 23 cm with a window on the back |
| Paper: | Uncoated paper - FSC mix 80 gr/mq |
| Colours: | 4+4 |

In light of the above and in order to guarantee a quick response to every emergency, PSP Italy expects the supplier to pre-print emergency envelopes and store them in one of its warehouse. When the emergency happens the supplier will be required to print the letters, fulfil and deliver packs to the postal office in a very short time from the reception of the artwork sent by PSP Italy (copywriting of the letter will be finalized afterwards the Emergency has arisen).

C. Newsletter

It is a direct mailing activity addressed to existing one-off or regular donors for donor retention purposes.

Through Newsletters donors are kept informed and updated on their donations, PSP Italy initiatives and events, global emergencies, UNHCR projects, etc.

Newsletters pack may include all or just some of the items listed below:

| LETTER + DONATION FORM | |
|------------------------|--|
| Dimension: | Open 42 x 29.7 cm |
| | Letter 21 x 29.7 + donation form 21 x 29.7 |
| Paper: | Uncoated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| LETTER (NO DONATION FORM) | |
|---------------------------|-----------------------------------|
| Dimension: | Open 21 x 29.7 cm |
| Paper: | Uncoated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| LETTER + MEMBERSHIP CARD | |
|--------------------------|---|
| Dimension: | Open 42 x 29.7 cm (letter 21 x 29 + donation form 21 x 29.7) with a perforation alongside the perimeter of the card (8,56 x 5,4 cm) which is plasticized one side only |
| Paper: | Uncoated paper - FSC OCR 90 gr/mq |
| Colours: | 4+4 |

| ENVELOPE | |
|-------------------|--|
| Dimension: | 22 x 31.5 cm with a window on the back |
| Paper: | Uncoated paper - FSC 80 gr/mq |
| Colours: | 2+0 |

| RETURN ENVELOPE | |
|-------------------|-----------------------------------|
| Dimension: | 10.5 x 21.5 cm no window |
| Paper: | Uncoated paper - FSC mix 70 gr/mq |
| Colours: | 1 color |

| NEWSLETTER 1 | |
|-------------------|---|
| Printout: | 16 self-covered stapled folded pages |
| Dimension: | Open: 41 x 28 cm - Closed: 20,5 x 28 cm |
| Paper: | Matte coated paper - FSC 115 gr/mq |
| Colours: | 4+4 |

| NEWSLETTER 2 | |
|-------------------|--|
| Dimension: | Open: 41 x 57 cm (A2) - Closed: 20,5 x 28 cm (A2 double folding final format A4) |
| Paper: | Matte coated paper - FSC 115 gr/mq - double folding |
| Colours: | 4+4 |

| ANNUAL REPORT | |
|-------------------|---|
| Printout: | 20 self-covered stapled folded pages |
| Dimension: | Booklet, Open: 29,6 x 21 cm, Closed: 14,2 x 21 cm |
| Paper: | Matte coated paper - FSC OCR 115 gr/mq (no OCR) |
| Colours: | 4+4 |

| CALENDAR | |
|---------------------|---|
| Description: | Staple + hole cut to hanging |
| Dimension: | cover + 24° open 27x19.5 cm, closed 13.5x19.5 cm |
| Paper: | Cover on matte coated paper FSC gr. 130 - interior on matte coated paper FSC gr. 90 |
| Colours: | 4+4 |

2.2.2 LOT B) Print and daily fulfilment of Welcome Pack and Thank you pack

While fulfilment of thank you pack is done as soon as 100 units are reached, the fulfilment of welcome pack is developed on a daily basis.

Only those agencies that can provide a daily fulfilment of the welcome pack will be therefore considered for lot C.

Agencies applying for lot C are requested to clearly indicate and confirm in their technical offer whether they are able to provide a fulfilment on a daily basis for the welcome pack and a fulfilment as soon as 100 units are reached for the thank you pack. Please note that in the financial form suppliers will be asked to quote the daily and the weekly fulfilment of the welcome pack.

A. Welcome pack.

It is a direct mailing activity addressed to new regular donors in order to give them a warm welcoming as part of the Organization.

Welcome packs are generally composed by the following items.

| WELCOME LETTER | |
|----------------|-----------------------------------|
| Dimension: | 21 x 29,7 cm |
| Paper: | Uncoated paper laser FSC 90 gr/mq |
| Colours: | 4+4 |

| THANK YOU CARD | |
|----------------|------------------------------|
| Dimension: | 10 x 15 cm |
| Paper: | Matte coated - FSC 300 gr/mq |
| Colours: | 4+4 |

| MEMBERSHIP CARD | |
|-----------------|---|
| Dimension: | 8,56 x 5,4 cm - ISO standard |
| Material: | Matte coated paper 400 gr/mq, plastic coated on the front |
| Colours: | 4+4 |

| DONATION FORM | |
|---------------|-----------------------------------|
| Dimension: | 21 x 29,7 cm |
| Paper: | Uncoated paper laser FSC 90 gr/mq |
| Colours: | 4+4 |

| RETURN ENVELOPE | |
|-----------------|-----------------------------------|
| Dimension: | 10.5 x 21.5 cm no window |
| Paper: | Uncoated paper - FSC mix 70 gr/mq |
| Colours: | 1 color |

| BOOKMARK | |
|------------|---|
| Dimension: | 5 x 20 cm |
| Paper: | Matte coated paper - FSC 300 gr/mq with a special die-cut shape |
| Colours: | 4+4 |

| ENVELOPE | |
|------------|---|
| Dimension: | 22.9 x 32.4 cm - with a window on the front (dimension: 4.5 x 10 cm. Position: 1.5 cm from the right and 22.5 cm from the bottom) |
| Paper: | Uncoated paper - FSC 120 gr/mq |
| Colours: | 4+4 |
| | |

| FOLDING FLYER | |
|---------------------|--|
| Description: | Cross fold with pre-glued pocket on inner side destroy |
| Dimension: | Closed DIN A5 (14.5x21cm); open DIN A3 |
| Paper: | Matte coated paper FSC 300 gr |
| Colours: | 4+4 |

| FOTOGRAFS | |
|-------------------|----------------------------------|
| Dimension: | 10x15cm |
| Paper: | photo paper with a glossy finish |
| Color: | 4/1 colors |

Please note that Welcome pack materials are under revision. Technical features could be modified.

Please also note that an additional element composing the Welcome pack could be a gadget such as a sticker or a luggage tag.

***FOCUS ON DAILY FULFILMENT PROCESS**

Materials already printed are stored in the supplier's warehouse and daily fulfilled.

Each day, the supplier:

1. Receives from PSP Italy a file containing a number of records with the indication of donors' personal information;
2. Converts the file as per postal requirements;
3. Pick up from the warehouse printed materials necessary for the process;
4. Manage the packaging process. Consider that there are 2 kind of packaging sequences: the standard and the DRTV one*
5. Delivers finished products to the postal office in order to be mailed.

***Standard sequence:**

This packaging process foresees:

- a) Laser printing of the Letter;
- b) Laser printing (donor's name) on the membership card;
- c) Application of the membership card on the flyer with matching of names;
- d) Enveloping: 1 envelope and 6 inserts;
- e) Mailing (postalizzazione).

***DRTV sequence (Very similar to the standard one)**

This packaging process foresees:

- a) Laser printing of the Letter with bank account information;
- b) One side only (name) thermography of the membership card;
- c) Application of the membership card on the flyer with matching of names;
- d) Enveloping: 1 envelope and 8 inserts (return envelope and donation form);
- e) Mailing (postalizzazione).

B. Thank you pack.

It is a direct mailing activity addressed to existing one-off and regular donors that have done a donation through a donation form (bollettino postale).

Thank you packs are generally composed by the following items.

| THANK YOU LETTER | |
|-------------------|---------------------------------------|
| Dimension: | A4 paper 21 x 29.7 cm closed 21x10 cm |
| Paper: | Uncoated paper laser FSC 90 gr/mq |
| Colours: | 2+0 |

| ENVELOPE | |
|-------------------|--------------------------------------|
| Dimension: | 11 x 23 cm with a window on the back |
| Paper: | Uncoated paper FSC 80 gr/mq |
| Colours: | 2+0 |

***FOCUS ON FULFILMENT PROCESS**

Materials already printed are stored in supplier's warehouse and fulfilled as soon as 100 units are reached.

Each day, the supplier:

1. Receives from PSP Italy a file containing a number of records, at least 100, with the indication of donors' personal information;
2. Converts the file as per postal requirements;
3. Pick-up from the warehouse printed materials necessary for the process;
4. Manage the packaging process*;
5. Delivers finished products to the postal office in order to be mailed.

***This packaging process foresees:**

- a) Laser printing of the Letter;
- b) Enveloping;
- c) Mailing (postalizzazione).

2.2.3 LOT C) Donor Care and PPH materials

This section contains materials that may be requested by the Donor care team and /or by the PPH unit. These materials are normally ordered in small quantities, depending on special activities, events, and special occasions.

A. PPH Materials

PPH Materials produced are generally the following.

| BROCHURE 1 | |
|-------------------|--|
| Dimension: | open format 21x84 (=21+21+21+21) - closed format 21 x 21 |
| Paper: | Glossy FSC 250 gr/mq |
| Colours: | 4+4 |

| BROCHURE 2 | |
|-------------------|---|
| Dimension: | open format 21x42 (=21+21+21) - closed format 10.5 x 21 |
| Paper: | Glossy FSC 250 gr/mq |
| Colours: | 4+4 |

| BROCHURE 3 (16 PAGES + COVER) | |
|-------------------------------|---|
| Dimension: | format 14.8x42 (=21x21) - closed format 14.8 x 21 |
| Paper: | Glossy FSC 170gr/mq |
| Colours: | 4+4 |
| Cover paper: | Glossy FSC 270gr/mq painted with opaque hydro paint (verniciato con vernice idro opaca) |
| Packaging: | stapled pages |

| BROCHURE 4 | |
|------------|---|
| Dimension: | open format 21x49.1 (=9.5x9.5x9.5x9.5x9.5) - closed format 20x21 |
| Paper: | Glossy FSC 170gr/mq double sided adhesive strips applied on the last leaf (Applicazione su ultima anta di strisce di biadesivo) |
| Colours: | 4+4 |

| ENVELOPE 1 | |
|------------|-----------------------------|
| Dimension: | 11 x 23 cm |
| Paper: | FSC 80gr/mq with seal strip |
| Colours: | 2+0 |

| ENVELOPE 2 | |
|------------|-----------------------------|
| Dimension: | 16 x 23 cm |
| Paper: | FSC 80gr/mq with seal strip |
| Colours: | 2+0 |

| ENVELOPE 3 | |
|------------|-----------------------------|
| Dimension: | 23 x 33 cm |
| Paper: | FSC 80gr/mq with seal strip |
| Colours: | 2+0 |

| FOLDER | |
|------------|---|
| Dimension: | open format cm 66x45; folded open format:44 x 31,5; closed format: 22 x 31,5 cm |
| Paper: | FSC Matte coated paper 300 gr/mq |
| Colours: | 4 + 4 |
| Packaging: | folding + die-cut |

| FLYER | |
|------------|-------------------------------------|
| Dimension: | A5 format (14,8 X 21cm) |
| Paper: | Fsc matte paper 115 gr/mq, one side |
| Colours: | 4+0 |

| INFORMATION PANNELLS | |
|----------------------|--------------------------------------|
| Dimension: | 1 cm. - format 1.00 mt x 2.00 mt |
| Packaging: | Self-stand pannels in forex sandwich |

| PHOTOCALL | |
|------------|---|
| Dimension: | 2x3mt. Made up of two self-stand pannels 1,5x2 mt. (in forex sandwich, 1 cm). Colours 4+0 |

| POSTER | |
|------------|-------------------------------------|
| Dimension: | A3 format (29,7 cm x42,0 cm) |
| Paper: | Fcs matte paper 150 gr/mq, one side |
| Colours: | 4+0 |

B. Donor care materials

Donor care materials that PSP Italy estimates to procure are listed below.

| FLYER 1 | |
|------------|--|
| Dimension: | Open: 20 x 21 cm, Closed: 10 x 21 cm |
| Paper: | Matte coated paper - FSC mix 130 gr/mq |
| Colours: | 4+4 |

| FLYER 2 | |
|------------|---|
| Dimension: | Open: 62,5 x 10 (=21+21+20,5) x 10 cm, closed: 21 x 10 cm |
| Paper: | Matte coated paper - FSC 170 gr/mq |
| Colours: | 4+4 |

| FLYER 3 | |
|------------|--|
| Dimension: | Open 21 x 29,7 cm - Closed 21 x 9,9 cm |
| Paper: | Matte coated paper 115 gr/mq |
| Colours: | 4+4 |

| LEAFLET | |
|------------|---|
| Dimension: | Open 40 x 26 cm closed a 12mo 20 x 9 cm |
| Paper: | Uncoated paper FSC 90 gr/mq. One side only black personalization. |
| Colours: | 4+4 |

| BROCHURE | |
|------------|--|
| Dimension: | Open: 65.5 x 20 cm closed 13.5 x 20 cm |
| Paper: | Uncoated paper - FSC 200 gr/mq. Die-cut and zig zag folded. The last panel is folded too and the little wings are inserted in two cuts. |
| Colours: | 4+4 |

| PHOTOCARD | |
|------------|---|
| Dimension: | 10 x 15 cm |
| Paper: | One-side only UV paint and matte coated paper - FSC 250 gr/mq |
| Colours: | 4+1 |

| HEADED PAPER 1 | |
|----------------|-------------------------------|
| Dimension: | A4 |
| Paper: | Uncoated paper FSC - 80 gr/mq |
| Colours: | 2+0 |

| HEADED PAPER 2 | |
|----------------|-------------------------------|
| Dimension: | A4 |
| Paper: | Uncoated paper FSC - 80 gr/mq |
| Colours: | 2+4 |

| POSTCARD | |
|------------|------------------------------------|
| Dimension: | 10x15 cm |
| Paper: | Matte coated paper - FSC 300 gr/mq |
| Colours: | 4+2 |

| THANK YOU CERTIFICATE | |
|-----------------------|------------------------------------|
| Dimension: | 21 x 29,7 cm |
| Paper: | Matte coated paper FSC - 300 gr/mq |
| Colours: | 4+0 |

| ENVELOPE | |
|------------|-----------------------------|
| Dimension: | 16x23 cm |
| Paper: | Uncoated Paper FSC 90 gr/mq |
| Colours: | 4+4 |

2.3 Technical notes

Please consider the following as “**Standard Services**” that all bidders should be able to provide for all LOTS:

- Upload of Donors' records and laser preparation;
- Laser printing (PERSONALIZATION) - one side only;
- Packaging and fulfilment;
- Cut and fold;
- “Omologazione” of the product for Postal fee chosen by PSP ITALY;
- Dispatching (booking of CMP availability; delivery to CMP);
- Provide PSP ITALY with the CMP delivery receipt;
- Conversion and normalization of files;
- Data processing, Data Matching and Management of Tax data (tax mailing only);
- Management of the entire process/activities concerning the relationship with Poste Italiane (such as information exchange with Poste Italiane focal points, amount of contractual counts monitoring, indication of the best fee in relation to conventions existing between PSP ITALY and Poste Italiane, etc..).

Please note that the above listed materials are based on PSP Italy past experiences. However, the nature of Printing and Production services is very peculiar and it is quite impossible to identify and list all materials that PSP Italy will be printing in the next 2+1 years. For this reason, please note that according to changing of needs or rising of new ideas/projects, materials and products described may change or new products may be ordered during the reference period.

2.4 Secure transmission of personal data

UNHCR will provide the supplier(s) with necessary personal data of the recipients for customization and sending of the printed materials. The transmission of personal data must be accomplished through a secure channel. UNHCR can provide a data repository accessible by the supplier throughout a SFTP protocol and specific account.

If supplier prefers to use a different transmission arrangement, evidence on the security of the transmission must be provided.

2.5 Scenario

The Startup date is expected to be September 1st 2019. The Scenario of this document, as per quantities indicated in the financial form, has to be used as a reference and can change according to UNHCR needs and budget availability.

Please note that PSP Italy expects prices to remain constant over the period of the Frame Agreement (2+1 years) even if quantities ordered will be less than those indicated in the financial form.

Please also consider that PSP estimates on average 3 emergencies per year.

3 REQUIREMENTS - IMPORTANT:

3.1 Technical proposal requirements

In order to take part to the present tendering process and being evaluated from a technical point of view, bidders are kindly requested to provide the following requirements based on the LOT or the LOTs they are participating to.

LOT A)

- Please provide a detailed description of how your company intend to manage and deliver the services in standard situation;
- Fill in ANNEX C Timing LOT A) pointing out timing necessary to print/produce (from the reception of the artwork sent by PSP Italy) and deliver each different materials both in standard and Emergency situations;
- Please provide a detailed description of how your company intends to manage and deliver the service in Emergency situations and submit an Emergency plan describing:
 - How you would support UNHCR to cope with the emergency;
 - Personal data of the Focal point (to be contacted during holidays too);
 - List of activities/actions to do before the emergency begins;
 - List of activities/actions UNHCR should do;
 - List of activities/actions that will be implemented by the Supplier;
- Please provide a description/solution to optimize costs when producing a complex pack in reduced quantities, like in Middle donors Appeals case.
- Please provide, **both digitally and physically multiple examples/best cases of similar materials developed for other no profit organizations such as:**
 - Samples of Direct Mailing Appeal including NON PAPER gadget for Direct mailing appeals specially thoughts for acquisition purposes.
 - Newsletters and Magazines
 - Some complex paper made samples
 - Some lift items samples.

LOT B)

- Please provide a detailed description of how your company intends to manage and deliver the services in standard situations;
- Fill in ANNEX C Timing LOT B) pointing out timing necessary to print/produce (from the reception of the artwork sent by PSP Italy) and deliver each different materials in standard situations;
- Please provide **both digitally and physically multiple examples/best cases of similar materials developed for other no profit organizations such as:**
 - Some Welcome packs/Thank you packs
 - Some complex paper made samples
 - Some lift items samples

LOT C)

- Please provide a detailed description of how your company intends to manage and deliver the services in standard situation;
- Fill in ANNEX C Timing LOT C) pointing out timing necessary to print/produce (from the reception of the artwork sent by PSP Italy) and deliver each different materials in standard situations;
- Please provide **both digitally and physically, multiple examples/best cases of similar materials developed for other no profit organization such as:**
 - Some Newsletter/Magazines samples
 - Some complex paper made samples
 - Some lift items samples

3.2 Innovation

This special section is dedicated to the innovative suggestions presented by the supplier as new approaches, focus on environmental issues, new products, new working procedures, activity follow-up and tests for standard and emergency activities to be suggested and proposed.

This section is not mandatory and will not be part of the financial evaluation.

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 description and company's 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;
- Balance sheet;
- Self-certification that contracts are in line with the Italian law;
- Documento unico di regolarita' contributiva (DURC);
- FSC certificate;
- List of main clients;
- A minimum of 3 relevant references with contact details;
- 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 describe the services you propose to UNHCR in order to meet the requests indicated in section 3 REQUIREMENTS - IMPORTANT based on the LOT or LOTS you are participating to, including Annex C) "Timing".
- Samples per each lot are to be delivered (in person, by post or by courier) within 25/03/2019 hrs 18:00 to the following address:

UNHCR - PSP Italy (C.a. Erika Celi)
Ref. RFP PSPIT0059
Viale Maresciallo Pilsudski 124,
00197 Roma - Italy

4.3 Proposed personnel

Please provide Curriculum Vitae of core staff involved in the project (maximum of 5 short CVs).

4.4 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 D).

4.5 UNHCR General Conditions for Provision of Services:

Your technical offer should contain your acknowledgement of the UNHCR General Conditions for Provision of Services by signing Annex E.

Important: Please note that proposals should be prepared in English or in Italian. 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 F for the checklist before submitting all documentations.

5 EVALUATION

5.1 Technical evaluation

The **Technical offer** for Lot A) will be evaluated using the following criteria and percentage distribution: **70%** (i.e. 70 points) from the total score of 100 points.

The technical offer for lot A) will be evaluated using the below criteria and percentage distribution.

| Criteria Description | Weight |
|---|------------|
| 1. Company Description and Qualifications | |
| General Liability / Capacity of the Company | 22.5 |
| Overall Direct Mailing production / time in business | |
| Experience of completing similar projects internationally/Italy | |
| 2. Quality of Service | |
| Comprehensiveness of Proposal. Quality/Clarity in interpreting and presenting the management/ project process | 42.5 |
| Speed and Efficiency in printing and delivering materials in standard situations | |
| Quality of the Emergency plan, including timing for the production and fulfilment of the packs | |
| Proposal describing a way of optimization of production costs in small quantities such as Middle donors appeals | |
| Quality / Innovation of NON PAPER gadget for Direct Mailing | |
| Quality of past examples/ best cases and physical samples | |
| 3. Project Staff | |
| Experience of core people who will work on the project | 5 |
| Total | 70% |

Bidders must have a minimum technical threshold of 42 out of 70 points for the technical proposal in order to be considered further for the financial evaluation.

The **Technical offer** for Lot B) and C), will be evaluated using the following criteria and percentage distribution: **60%** (i.e. 60 points) from the total score of 100 points.

| Criteria Description | Weight |
|---|------------|
| 1. Company Description and Qualifications | |
| General Liability / Capacity of the Company | 25 |
| Overall Direct Mailing production / time in business | |
| Experience of completing similar projects internationally/Italy | |
| 2. Quality of Service | |
| Comprehensiveness of Proposal. Quality/Clarity in interpreting and presenting the management/ project process | 30 |
| Speed and Efficiency in printing and delivering materials in standard situations | |
| Quality of past examples/ best cases and physical samples | |
| 3. Project Staff | |
| Experience of core people who will work on the project | 5 |
| Total | 60% |

Bidders must have a minimum technical threshold of 36 out of 60 points for the technical proposal in order to be considered further for the financial evaluation.

5.2 Financial Evaluation

LOT A)

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.

LOT B) and C)

The financial component is 40% of the total score. 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.

For all the LOTs, the Financial Offer Form (Annex B) should be completed in all its parts for all ranges of quantities. All cells marked in yellow should be filled in.

In the Financial Offer Form, in addition to the printing services, bidders are also required to quote:

1. Storage service intended as a fee per 1 month storage of a 3 mq space (to have the service for free will be considered an asset);
2. Color proof;
3. Shipping costs.

Please note that PSP Italy expects prices to remain constant over the period of the Frame Agreement (2+1 year).

6 Customer Responsibilities

PSP Italy will be responsible for:

- Appointing a dedicated project manager for each project;
- Providing all materials, including creatives, and references according to required specifications;
- Providing support and all needed guidance in order to ensure smooth and timely communication between the supplier and offices participating in the project;
- Timely information on delivery plans and locations;
- Providing the supplier(s) with necessary personal data of the recipients for customization and sending of the printed materials through a secure channel as agreed with the supplier(s).

7 Key Performance Indicators

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 printed/produced products according to given creative brief and UNHCR brand book;
- Flexible support during the production phase;
- Understanding of UNHCR needs and guidelines.