ANNEX A: TERMS OF REFERENCE
RFP/24/006/RBAP/PSP

REQUEST FOR PROPOSAL FOR FRAME AGREEMENT FOR THE PROVISION OF DIGITAL MEDIA BUYING SERVICES FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN HONG KONG

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1 Introduction

1.1 Background

The United Nations High Commissioner for Refugees, UNHCR, was established on 14 December 1950 by the United Nations General Assembly. The UN Refugee Agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. Its primary purpose is to safeguard the rights and well-being of refugees. It strives to ensure that everyone can exercise the right to seek asylum and find safe refuge in another State, with the option to return home voluntarily, integrate locally or to resettle in a third country. For over 70 years, UNHCR has helped millions of people to restart their lives. They include refugees, returnees, stateless people, the internally displaced and asylum-seekers. Its interventions in the areas of protection, shelter, health and education have been crucial, healing broken pasts and building brighter futures.

Please find more via UNHCR website: www.unhcr.org and www.unhcr.org/hk

Private Sector Partnerships Service (PSP)

Private Sector Partnerships Service (PSP) sits within UNHCR's Division of External Relations (DER) and is responsible for mobilizing resources from the private sector for refugees. UNHCR has developed a Private Sector Fundraising Strategy focusing on both Individual Giving and Private Sector Partnerships, identifying priority fundraising markets and regions.

More information can be found on UNHCR globally; www.unhcr.org and about UNHCR Hong Kong www.unhcr.org/hk

1.2 Statement of Purpose & Objectives

UNHCR is aiming to boost the digital presence of UNHCR to deliver long-term sustainable solutions that provide security, dignity, and a future for refugees. With our strategy of 'Digital Transformation' we will look first for digital opportunities in everything we do. Our local investment will prioritize rapid expansion areas of digital supporter engagement and building new acquisition.

UNHCR is seeking to contract with a local digital media planning and buying agency ("Vendor") for the markets in Hong Kong and Macao Special Administrative Regions ("Services") to help manage integrated acquisition campaigns to better assimilate all media channels, including both supporter engagement and fundraising campaigns.

UNHCR will be engaging the selected Vendor(s) to lead on the local paid media campaigns, digitally, including new donor acquisition, lead generation, and supporter engagement.

The holistic objectives will have two (2) parts, with each budget split and KPI as below based on last click attribution. Please note that the figures are PSP HK best estimates based on experience and forecasting and it cannot be considered as commitment. The actual workload/volume will be defined via different projects and confirmed on the corresponding statement of work and purchase order.

The total estimated media budget within this scope is estimated for HKD 6,491,700:

A. **Digital Acquisition Campaign**
   1 May 2024 – 31 Apr 2025: HKD 1,386,000 (all fees inclusive)
   1 May 2025 – 31 Apr 2026: HKD 2,080,000 (all fees inclusive)
   1 May 2026 – 31 Apr 2027: HKD 2,392,000 (all fees inclusive)

Digital acquisition shall meet the below KPI with all fees inclusive:

- ROI minimum 1 within the first year of service period
- Number of donors: 7,998
- Monthly donor ratio: 11%
- Average one-off gift amount: HKD 1,373
- Average monthly gift amount: HKD 293

B. Engagement Campaign:

1 May 2024 – 31 Apr 2025: HKD 150,000 (all fees inclusive)
1 May 2025 – 31 Apr 2026: HKD225,000 (all fees inclusive)
1 May 2026 – 31 Apr 2027: HKD 258,700 (all fees inclusive)

Engagement KPI: Engagement rate to reach 10% that will assist conversion

Service period: 2-year frame agreement starting from the effective contract date, tentative on 1 May 2024. The frame agreement may extend for 1 more year, subject to performance review.

1.3 Pre-selection criteria

Please take note of the pre-qualification criteria hereunder, failure to comply AND failure to submit these documents with your technical offer will result in disqualification:

1. **Locally based and registered**: your company must be registered in China mainland and/or Hong Kong SAR and/or Macau SAR and licensed to provide digital media planning and buying agency. To establish compliance please **send your company registration certificate and fill out UNHCR Vendor registration form (Annex G)***
2. Acceptance of **UNHCR special data protection conditions(Annex D)**
3. Acceptance of **UNHCR General Conditions of Contract Annex E)**
4. Acceptance of **UN Suppliers Code of Conduct (Annex F)**

1.4 Joint venture, sub-contracting

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company is the project led to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winner bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

** In case your company is a PO supplier, i.e., has valid vendor profile in UNHCR ERP system or has previously had a PO with UNHCR, there is no need to send Annex G, unless important company information needs to get updated. Compliance with the rest of the pre-selection criteria remain unchanged.*

2 Requirements

Service Requirements
It is essential that Vendor who responds to this tender can demonstrate their core digital competency in full Services integrated acquisition with digital media planning and buying capacity.

2.1 Account Management

- Deliver campaign strategy and content plans for UNHCR digital campaigns/events.
- Regular evaluation meeting to review performance, advise and implement on how best to monitor, report on and optimize digital media and social media marketing and engagement activities internally.
- To support UNHCR with negotiating innovation strategies and partnerships including exclusive advertising deals with partners and media marketing suppliers such as Facebook, Google, Bing/Yahoo, YouTube, Instagram LinkedIn and other platforms when appropriate.
- To produce documentation such as local market trends / insights, user guides and to provide training when required.

2.2 Media Planning and Buying

- Design, develop and execute digital marketing strategies which achieve local UNHCR acquisition and retention objectives with an emphasis on acquiring regular givers. To include, paid search engine advertising, social media advertising, influencers' content amplification, online display, programmatic, re-targeting, real-time bidding, mobile and in-application advertising, digital video advertising, affiliate marketing, permission based eDM, content marketing and native advertising, online sponsorship marketing and other suitable forms of paid advertising for the purposes of awareness building, brand building, supporter growth, lead generation and supporter conversion.
- Develop and execute strategy and media plans which leverage a diverse set of supporters' acquisition strategies and channels to reach and convert new audiences, including both non-emergency and emergency campaigns
- Develop and execute campaign testing plan, including optimizing elements based on performance. To include automated multi-variant testing, creative 'theme' testing, audience and target testing, creative, context, channel and media testing.
- Provide best paid keywords, in both Traditional Chinese and English, for top performing keywords, ad copies and A/B tests using experiments and draft function, or other technology as required.
- Support UNHCR to implement the latest search trends i.e., Voice Search, Image Search, and Facebook Search etc.
- Manage all aspects of paid media campaigns including building awareness to assist conversion.
- Provide ongoing strategic advice, optimizations and media planning based on results; constantly optimize for the best possible results and adjust media plan and media buying accordingly.
- Provide management of UNHCR's ad accounts on Google, Yahoo/Bing, Facebook, Instagram, YouTube, LinkedIn, programmatic, mobile and in-app, digital video, display, content and native, and other ad platforms as needed.
- Align and support with UNHCR attribution requirements and supporter engagement journey through Omni-channel.
- Provide weekly reports, insights and post campaign report (within 7 working days upon campaign completion), including all key media and donation metrics and overall CPA/ROI.
- Continuously optimize, adjust and provide recommendations to marketing programs in order to achieve fundraising objectives, donation, brand, supporter, and audience expansion targets.
- Use Google Tag Manager (GTM) and Google Analytics (GA) as well as paid media tracking (such as Campaign Manager) for reporting and testing.
- Use UNHCR UTM naming conventions for all ads and marketing campaigns.

- Set up and push tracking tags for Ad platforms to all relevant landing and conversion webpages via UNHCR's Google Tag Manager (GTM) account for UNHCR staff to approve and publish.
- Document all Ad trackers implemented on UNHCR web properties with purpose, data being collected, 3rd party data processors involved, and types of processing, data storage locations and data retention policies.
- Provide best-practice reporting and analysis on both multi-channel and single channel media performance.
- Provide proposed account structure and manage the paid search engine marketing channel; implement and optimize this channel and ensure an overall desired ROI.
- Provide strategy and methodology for bidding/negotiating with Vendor to purchase space for banner advertising/programmatic display and other appropriate forms of online advertising; implement channel and achieve agreed upon CPA/ROI.
- Provide and execute media strategy for supporter journey such as traffic retention and retargeting
- Provide media strategy for native advertising and implement activities.
- Provide recommendations to UNHCR to test new digital marketing strategies for supporter acquisition.
- Provide support for UNHCR's in-house media buy, including but not limited to liaising with digital advertising platforms and settling media buy payments on behalf of UNHCR

2.3 UNHCR Responsibilities

- Providing media briefs and submitting budgets
- Provide landing page and e-commerce environment, and tracking requirements
- Approve all creatives / media assets, keywords, and ad copies.
- Provide access to Google Analytics for reporting and audience planning
- Reconciling reports submitted by the Vendor with UNHCR database reports and letting Vendor know of any required adjustment to the reported figures
- Provide existing campaign assets to be adapted to local market as needed
- Provide access to UNHCR content and brand guidelines (e.g., images and data) for the elaboration of campaigns
- Allow 3rd party trackers to be included in webpages

3 Content of the Technical Offer

- **PLEASE FILL OUT ANNEX B AND ATTACH ALL REQUESTED DOCUMENTS.**
- **PLEASE PROVIDE ALL INFORMATION ON ANNEX B FOR SCORING.**
- **YOUR OFFER CAN BE SUBMITTED IN ENGLISH OR IN CHINESE**
- **NO FINANCIAL INFORMATION CAN BE ADDED TO YOUR TECHCNIAL RESPONSE.**
- **ONLY COMPANIES THAT ARE COMPLIANT WITH ALL PRE-SELECTION CRITERIA (SECTION 1.3) WILL PROCEED TO THE TECHNCIAL EVALUATION**

3.1 Company Qualifications

During the technical evaluation, in this section, the panel will score your company`s similar service provision experience based on the number of clients.

3.2 Proposed Services

During the technical evaluation, in this section, the panel will score your company's compliance regarding the required services listed under section 2 and the capacity to achieve the proposed targets under section 1.2.

3.3 Staff qualifications, account management

Account management is crucial for running a successful digital campaign. This section is dedicated to measure the proposed customer service towards UNHCR PSP Hong Kong team. During the technical evaluation, in this section, the panel will score the experience of the core people who will work on UNHCR project (based on the number of years and demonstration expertise in the area):

- Please indicate the composition of the team you propose to provide for the project.
- Please provide short biographies of core staff who will be working on the account.

3.4 Expected volume of work

The total estimated media budget within this scope is estimated for HKD 6,491,700:

Digital Acquisition Campaign

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Engagement Campaign:

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PSP Hong Kong estimated number of hours to be used for the different expertise is the following for year 1; from year 2 onwards the operation expects a +15% increase to cover for market growth.

Account Director: 600 hours per week in year 1

- Oversight of Digital Campaigns and ensure clients' expectations are met

Account Manager: 1000 hours in year 1

- Monitor the performance of Digital Campaigns across different channels and ensure the strategic output meets the KPIs listed in the campaign brief
- Develop bi-weekly report for UNHCR to review campaign performance

Account Analyst: 600 hours in year 1

- Provide data analysis and offer timely optimization advice for UNHCR

Account Executive: 2000 hours in year 1

- Manage ad setup according to the campaign brief on a day to day basis and during emergency campaigns
- Provide assistance and communicate with advertising platforms as needed

Please note that the above figures are PSP Hong Kong best estimates based on experience and forecasting and it cannot be considered as commitment. The actual workload/volume will be defined via different projects and confirmed on the corresponding statement of work and purchase order.

4 Evaluation

Only offers that have passed the pre-selection will be technically evaluated.

The Technical offer will be evaluated using inter alia 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.

4.1 Technical evaluation

Company Qualifications (max 20 points)	**Documents, information to be provided to establish compliance with the set criteria**
Service provision experience (client based) (20)	Service provision experience in digital media buying services. • Please list the current and previous clients. • Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted. Reference and background checks are part of the due diligence during the selection process and in case of negative feedback may lead to disqualification. *Please note that without the list of clients, 0 point will be given.*
Proposed Services (max 40 points)	**Documents, information to be provided to establish compliance with the set criteria**
Compliance with the services required under digital media buying services (2.1) (20 points)	Comprehensive proposal presented including all services listed under point 2.1., outlining your company`s experience and strategy to fulfil requirements; A description of your strategy on how to provide the best quality service in compliance with all services listed under section 2.1. Please confirm capability to achieve proposed targets. Please list at **least two (2)** examples demonstrating your agency`s experience in digital marketing services in Hong Kong from the past 3 years. *Please note that if you don`t add information about this section on Annex B, 0 point will be given.*

Media buying, implementation, management, and reporting (2.2) (20 points)	Comprehensive proposal to be presented to demonstrate capacity and capability to provide services as listed under 2.2, including: • one (1) sample campaign management summary report • one (1) digital media buying billing and report. In your response, please include your strategy to acquire donor through digital fundraising campaign *Please note that without samples, 0 points will be given*
Staff qualifications, account management (max 10 points)	**Documents, information to be provided to establish compliance with the set criteria**
Experience of core people who will work on UNHCR project. (Including experience with similar projects)	Experience of core people who will work on UNHCR project, including experience with similar projects. Please include: CV or bio of the people that will be assigned to UNHCR account (max half A4 page) *Please note that without the CVs, 0 points will be given.*

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

Companies might be requested to deliver a presentation based on their technical proposal via Teams. The dates for the presentations will be communicated in time.

4.2 Financial Evaluation

The financial proposal is to be submitted ONLY by filling in Annex C. No other format will be accepted. UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes.

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