Annex A: Terms of Reference
RFP/24/008/RBAP/PSP

REQUEST FOR PROPOSAL
FRAME AGREEMENT FOR THE PROVISION OF DIGITAL MARKETING SERVICES FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN INDONESIA

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1 Introduction

1.1 Background

UNHCR has been working in Indonesia since 1979, when the Government of Indonesia invited UNHCR to assist with the establishment of a refugee camp on Galang Island to accommodate more than 170,000 refugees who had fled conflict in Southeast Asia.

The primary purpose of the Private Sector Partnership Service (PSP) in Indonesia is to generate income from individual donors, corporates, and foundations, in order to support UNHCR activities in Indonesia and worldwide. PSP activities in Indonesia started in 2020 and now include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Partnerships & Philanthropy (PPH) seeking support from companies, foundations focusing on Islamic Philanthropy and High Net-Worth individuals.

Within the Individual Giving strategy, PSP Indonesia primary objective is to continue increasing its donor base with high quality donors.

Face-to-Face is currently our largest donor acquisition channel. But as part of our strategy to diversify channels, digital engagement is of great importance for donor acquisition and development and to increase UNHCR brand awareness and positioning in Indonesia.

We are currently running digital acquisition through paid search campaigns, and social media advertising. Digital is and will remain one of our main acquisition channels. Digital is also used to retain our donors, by providing them journeys such as monthly newsletters and other updates about UNHCR's work through e-mail marketing.

Digital donation platforms have recently been having a surge in Indonesia for these past few years. In-line with the data above, the predominantly young demographics of Indonesia increasingly using online means to give donations. Now there are several popular fundraising platforms, among them are kitabisa.com, WeCare.id, Campaign.com, Kolase.com, launch good and BenihBaik.com. This further shows that Indonesia has a huge potential for online fundraising.

UNHCR Indonesia intends to collaborate with external partners to further strengthen our programs for the refugee cause. We are seeking for service providers with vast experience and keen expertise on digital fundraising, specifically in collecting digital donations and acquiring donors' data through omnichannel digital marketing. The partnership will support UNHCR Indonesia digital fundraising activity to promote UNHCR donation landing page https://donate.unhcr.or.id/ In seeking donations and donors' data, this partnership will be mutually beneficial for both parties in enhancing crucial programs to help those in need in Indonesia and abroad

1.2 Statement of Purpose & Objectives

The purpose of the present RFP is to select a digital agency/ (ies) to support UNHCR Indonesia in developing and managing digital acquisition programs to recruit quality donors through various innovative channels or drivers, with a specific focus on donor acquisition, in order to:

- Promote online fundraising campaigns and optimize the performance;
- Supporters/donors acquisition, both one-off and regular;
- Improve supporter/donor loyalty and long-time value;

The agency/ (ies) goal is to develop, implement, execute, test and optimize the most effective strategy/ (ies), in order to achieve the greatest possible impact for a given fundraising budget. PSP Indonesia expects from the agency to maximize ROI.

The frame agreement (FA) will be signed with the successful bidder(s) for an initial period of twelve (12) months (Phase 1) and will be extended at the sole discretion of UNHCR for additional two times twelve (12) months (Phase 2), upon satisfactory evaluation of the first six months of phase one and evaluation of

performance each year. Services will be evaluated based on the number of qualities of the new donors that recruited, and cost performance benchmarks agreed upon in advance between UNHCR and the vendor.

Phase 1 - 1st of June 2024 until the 31st May 2025 (12-months)

Phase 2 - 1st of June 2025 until the 31st May 2026 (24-months)

In UNHCR's acquisition strategy, both quantity and quality are of high importance. Meaning UNHCR is not only aiming for volume, but for committed donors with high lifetime value (LTV) too.

Please be informed that joint venture, or contractor/subcontractor relationship are allowed. In either case, bidder needs to confirm which company is the project lead to take responsibility of the commercial relationship. The bid is to be submitted under one company, as leader. The winning 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.

The selected vendor is required to manage and implement digital donor acquisition activities to help achieve the following targets:

Phase 1 - Donor numbers One Off: 828 and Regular Giving: 204 Donors
Phase 2 - Donor numbers One Off: 2,760 and Regular Giving: 696 Donors

The targets mentioned above need to be realized with a cumulative ROI of at least:

- **0.7 for a 12-month period**
- **1.5 for 24 months**
- **2.1 for 36 months**

PSP Indonesia estimated the below Digital Services total cost
- Phase 1: IDR 667,500,000
- Phase 2: IDR 2,100,000,000

Agencies are also requested to indicate in their bids their maximum capacity and availability, as well as to give feedback on the expected percentages and KPI's in order to get a realistic indication.

1.3 Pre-selection criteria

Your company must be compliant with all the following pre-selection criteria to participate at this bidding:

Pre-selection criteria	Documents, information to be provided to establish compliance with the set criteria
You company must have a local operation in Indonesia.	Please confirm the location of your operation and office in Indonesia. To establish compliance please **send your company registration certificate and fill out UNHCR Vendor registration form (Annex G)**
Compliance with UNHCR data protection	Please acknowledge UNHCR data protection clause (Annex D).
Compliance with UNHCR general terms and conditions	Please acknowledge UNHCR general terms and conditions (Annex E).
Compliance with UN Supplier Code of Conduct	Please acknowledge UN Suppliers Code of Conduct (Annex F)

Note: in case your company is a registered PO-supplier for UNHCR Indonesia (i.e., UNHCR has sent already purchase orders for local service provision or having a signed frame agreement in place), no need to submit company registration certificate, unless any information has changed and needs to be updated.

2 Requirements

2.1 Media buying, implementation, management and reporting

- Co-develop a media plan (with monthly iterations) which leverages a diverse set of donor acquisition strategies and channels to reach and convert new audiences;
- Promote UNHCR Donation Landing Page for the donations
- Manage all aspects of the Search paid media campaign (campaign set up, implementation and optimization) on a day-to-day basis and during emergency campaigns;
- Propose account structure and manage the paid search engine marketing channel, implement and optimize this channel and ensure an overall positive ROI;
- Content creation (content writing/edit, Graphic Design)
- Create a creative approach and audience targeting strategies for paid social media marketing and promotion (e.g. Facebook, Tik Tok and Instagram advertising, newsletter, third party partner, brand partnership, and influencer)
- Monitor and report on all key metrics and overall ROI;
- Use Google Tag Manager (GTM) and Google Analytics (GA) as well as paid media tracking (such as DoubleClick bid 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.
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI;
- Provide continuous optimization, adjustments and recommendations to digital acquisition program, in order to achieve digital fundraising and online donor engagement objectives.

2.2 Creative digital campaigns design and development

To achieve the goals of promoting digital charity programs, we expect the agency to create an overall digital strategy by creating, implementing, and testing various digital campaigns or supporter journeys, depending on season, event, thematic, emergency.

Please describe how you will:

<u>Develop, implement, test and run digital campaigns like:</u>

- Seasonal campaign: Ramadan Campaign, End of Year campaign, for example
- Thematic campaign: World Refugee Day, Women's Day, for example;
- Any other suggestions are welcome.

<u>The agency is also required to provide:</u>

- Develop and propose any creative content relevant to achieve our goals;
- Development and design of key message(s)/propositions which will appeal to the target audiences and reflects UNHCR's branding and areas of work;
- Development of creative display ads, using text, images, animation and video for display and retargeting within UNHCR branding;
- Develop social media advertising creatives;
- Test and optimize landing page to improve returns from search and paid advertising whether for charity or for a lead generation campaign;
- Develop copy, design and other formats of digital content for email marketing campaigns for subsequent communications to UNHCR supporters;
- Translation or writing of emails/newsletters/pushing news;
- Recommendations for landing page, website and email appeals design and content to offer a fully integrated supporter-centric online user experience;
- Recommendations and implement audience research and insights across multiple digital channels.
- Description of the core team dedicated to work with UNHCR PSP Indonesia to prove strong account management.

- Monitor and report on all key metrics and overall ROI;
- Provide weekly/monthly and quarterly qualitative and quantitative analytics report and evaluation on the impact of digital campaign including key metrics and overall ROI. (Leads, optimization, landing page conversions etc.);
- Provide quarterly analysis reports assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of acquisition activities in previous quarter including detailed attribution tracking;
- Continuously optimize, adjust and recommendations to digital marketing program in order to achieve digital engagement objectives, conversion rate and audience expansion targets;
- Provide all services in compliance with data protection regulations

2.3 Innovation & emergencies

- Please describe your view on innovation and which **innovative projects** you have done recently. Include your suggestions and innovative ideas and approach for setting up a sustainable donor acquisition (including donor journeys) for UNHCR.
- **In case of emergency,** all focus needs to go to the emergency within 24 to 48 hours to be able to raise as many funds as possible for the crisis and to boost engagement. Please tell us how you propose to be ready for an emergency, where very fast production and implementation is required in pressing timings:
  - ✓ Which mechanism do you propose?
  - ✓ What kind of responsiveness are you able to offer?
  - ✓ Please propose a draft of an effective planning in case of an emergency campaign

2.4 Performance of Work

The appointed vendor is responsible to provide all supervision, equipment, labor and materials necessary to complete the work as described herein. The vendor shall supervise and complete the project using its best skill and attention. The vendor shall furnish management, supervision, coordination, labor and services which (i) expeditiously, economically and properly complete its scope of work, (ii) comply with the requirements of these Terms of Reference.

All services rendered by the vendor shall be performed by or under the immediate supervision of persons possessing expertise in the discipline of the service being rendered.

The vendor shall conduct all its activities in strict confidence. The vendor shall handle and respect data privacy, if applicable, in a professional manner.

2.5 Compliance with the Government Requirement

The vendor shall comply with all Indonesia applicable laws, statues, ordinances, codes, rules, regulations and lawful orders of all governmental, public and quasi-public authorities and agencies having jurisdiction over the project.

2.6 Vendor Registration Form

If your company is not already registered with UNHCR, please complete, sign, company stamp, and submit the Vendor Registration Form (**Annex F**).

3 Payment Method

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

Evaluation

Only offers 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.

3.1 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 in the Indonesia non-profit landscape. • 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)	Comprehensive proposal presented including all services listed under point 2.1., . A description of your strategy on how to provide the best quality service in compliance with all services listed under section 2. Please confirm capability to achieve proposed targets. Please list at **least two (2)** examples demonstrating your agency`s experience in digital marketing services in Indonesia 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 donors through digital fundraising campaigns *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 a brief explanation on your customer service approach, and account management strategy to support PSP Indonesia. 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.

3.2 Financial Evaluation

UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes. Please use single currency (IDR) to provide your fee structure and sum-up the total cost for the Services. Please fill in, sign and company stamp of the Financial Quotation (Annex C) for your price proposal.

Your Financial Quotation must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection.

The Financial Quotation (Annex C) and only this document will be evaluated based on the lowest total pricing offered.

4 Customer responsibilities

PSP Indonesia will be responsible for:

- Appointing a dedicated project manager.
- Providing information and content about UNHCR's protection program and activities;
- Providing logos and materials.
- Providing input on materials used by the vendor.
- Informing the vendor about expectations concerning reporting, statistics, key performance indicators and ROI's to ensure high level results and weekly meetings on progressions and deliverables of activities;
- If needed, accessing and /or working in Business Managers (social media) and Google campaign set-up environments.
- Providing media briefs and submitting budgets
- Provide landing page and e-commerce environment, and tracking requirements
- Provide access to Google Analytics for reporting and audience planning
- 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

5 Key Performance Indicators

5.1 Performance Evaluation

UNHCR expects to monitor the performance of the selected supplier(s) on a regular basis according to the following KPI's:

- Average monthly and one-off donation;
- Donors per month;
- ROI;
- Cost per Acquisition;
- Cost per recurring and one-off donor;
- CTR (Click Through Rate);
- Conversion Rate;
- Live Time Value forecast;
- UNHCR Brand awareness;
- Supplier readiness in emergency situations.
- Overall teamwork between supplier and PSP Indonesia.