

Annex A: Terms of Reference
for the provision of TV media buying services in Canada
CANADA/RFP/PSP/2019/001

Bidders are required to submit any request for clarification or any question in respect of this ToR by e-mail to galer@unhcr.org. The deadline for receipt of questions is **the 30th of July 23:59 pm 2019 (GMT-4 Canada time)**.

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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. Its staff of more than 11,000 personnel is helping more than 65 million people in 130 countries. Staff members work in a diversity of locations and conditions including in our Geneva- based Headquarters (HQ) and more than 100 field locations. For more information, please see <http://www.unhcr.org>.

1.1.1 Private Sector Partnership Service (PSP) in Canada

The primary purpose of the Private Sector Partnership Service (PSP) in UNHCR Canada is to generate income from individual donors, corporates and foundations, in order to support UNHCR activities worldwide. PSP activities in Canada include two different main programs: Individual Giving (IG), raising money from individuals both regular and one-off, and Private Philanthropy (PPH) seeking support from companies, foundations, small and medium sized enterprises (SMEs) and High Net-Worth individuals.

Within the Individual Giving strategy, DRTV is a relatively new channel, launched in 2017 with great success. DRTV is expected to continue to play an important role for donor acquisition in Canada, especially as a source of new regular givers, as part of diversified acquisition program.

Since 2017, we have progressively scaled up the media spend on DRTV. We are currently running two spots over a set of core English language stations and are testing two spots on French language stations. We primarily purchase off-peak, pre-emptable media and try to purchase spots months in advance in order to maximize availabilities.

Response to the DTRV program is captured through an inbound call center, a unique landing page and through spot attribution across our website. Spot attribution is facilitated by our analytics software, TV Squared. On the English program, roughly 85% of all gifts are made through attributed web gifts. We are also testing a mobile/text based response mechanism this year. Alongside our DRTV program, we run digital retargeting ads in order to try and maximize response.

Our creative and production needs are handled by our global DRTV vendor, DTV who are based in London UK. In addition to providing spots and edits, they also work with us on analytics and the overall program strategy.

1.2 Statement of Purpose & Objectives

PSP Canada is looking for the establishment of Frame Agreement with one or more TV media buying agency/ (ies) to support in the purchase of media across stations in Canada, in order to:

- Air spots which procure for UNHCR regular and one-time gift donors at a positive ROI (return on investment);
- Maximise cost efficiencies (cost per spot and cost-per-thousand) and deliver converted response at the lowest possible cost;
- Develop test matrices (time-length, ask amount, response mechanism) in order to optimize the performance of the program
- Recommend a media spend plan that help us grow a set of core stations through thoughtful station testing

The agency/ (ies) goal is to develop, implement, execute, test and optimize the most effective media-buying strategy/ (ies), in order to achieve the greatest possible impact for a given fundraising budget.

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Overall PSP Canada expects from the company to deliver on or exceed annual budget goals whilst maximizing ROI.

The Frame Agreement will be signed with the successful bidder(s) for a period of three years (3) with the possibility of further extension for two (2) additional periods of one (1) year each:

Phase 1: March 2020 – February 2021
Phase 2: March 2021 – February 2022
Phase 3: March 2022 – February 2023
Phase 4: March 2023 – February 2024
Phase 5: March 2024 – February 2025

In order to indicate the volume of the work, please find hereunder PSP Canada projected media spend:

- 2020: \$1.5M
- 2021: \$1.7M
- 2022: \$1.9M
- 2023: \$2.1M
- 2024: \$2.3M

These budgets are subject to the performance we are able to achieve. There is capacity to grow the program if performance exceeds projections. The budget is inclusive of all fees to the media agency but exclusive of fees paid towards creative production, response handling, production, dubs and detailed reporting.

Performance is primarily measured through ROI. Minimum performance levels are indicated as following:

ROI should be at least 0.7 at 12 months, 3.0 at 60 months, (inclusive of all program costs) for all years.

The successful bidder(s) will be requested to maintain their quoted price model for the duration of the contract.

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. In addition, the agencies are also required to present their overall strategy for delivering innovative media-buying strategies. Agencies should also provide a **minimum threshold** is applicable, for monthly and annual media spend in the case that you do not take projects below a certain spending threshold.

Additional note: The budget allocated may vary and is subject to UNHCR's confirmation. Each year, budget will be confirmed through a specific "Statement of Work" (SOW) and corresponding purchase order (PO).

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2 Requirements

Pre-selection criteria (mandatory to fulfil with this criteria):

In order to be eligible to participate at this bidding, your company has to have local office in Canada and your company has to be authorized to work / do business in Canada. In order to establish compliance with this criteria, company profile and registration certificate are to be sent. Failure to comply with these pre-selection requirements, will result in disqualification. Only offers compliant with this Yes or No criteria will be considered for evaluation.

The evaluation will be carried out separately on technical and financial level. Please make sure the all requirements are included into your proposal.

You should present your proposal in English.

2.1 Core requirements

2.1.1 Account Management/Strategic Media Planning

- Provide overall account management including an account manager
- Develop an annual media plan (with monthly iterations) which takes into account past testing and learnings and accounts for testing to develop new learnings to further optimise the program
- Provide ongoing strategic advice, optimisations and media planning based on results; constantly optimize for the best possible CPA/ROI and adjust media plan accordingly
- Budgets are determined in November of each year for the period of March –Feb in the subsequent year. Please thoroughly describe your approach to researching and planning media spends, taking into account past-performance, station testing, tactical testing (time-length, price-point, and voice-over) and creative testing.
- Please indicate the various steps you would take over the course of a year in planning e.g. initial annual planning and ongoing revisions based on results. Please indicate the frequency with which you recommend having teleconference account updates and in-person account updates.
- Please share samples as below and explain each sample in terms of how they fit into the requirements above.
 - One (1) sample media plan
 - One (1) testing plan
- Please indicate Canadian English and French campaign experience. Please indicate key differences you see between both markets and any variances in strategy you typically employ to account for these differences.
- Inter-agency partnership: with most Direct Marketing channels, effective media buying and planning alone will not guarantee success. Please outline how you would work with UNHCR and their other agencies, e.g. call centre, creative agency, etc. to create a high performing inter-agency partnership.

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- **Competitor activity:** please provide details of how you would keep UNHCR informed on competitor activity and any impact this would have on their DRTV marketing strategy. If you work with clients who would be considered competitors of UNHCR, please indicate how you manage these within your agency.

2.1.2 Media planning, buying, implementation and management

- Manage all aspects of the paid media campaign including TV ad distribution, broadcast verification, delivery confirmation
- Please outline your approach to buying airtime in terms of any deals that you may have in place or preferred relationships with any networks and how these may benefit UNHCR. Please outline the network types / groups you buy for your clients. Please indicate the number of networks you have worked with in the past year.
- We currently only buy linear TV media. We are looking to test over-the-top (OTT) advertising in the future. Please provide information about your firm's capacity and experience in this area or other non-linear media buying capabilities.
- Please outline whether your company guarantees placement of spots and indicate the recommended guaranteed placement. We currently primarily buy pre-emptable media but are open to testing non-preemptable spots if the ROI is positive. Please explain your firm's experience with both pre-emptable and non-preemptable media buying.
- Note that due to frequent sell-outs, we tend to buy pre-emptable media, as early as possible maximising or even surpassing our allocated budget. We then cancel purchases prior to the airing date, prior to a penalty being incurred for cancellation, if results indicate that the spot purchased is not optimal and to take us within our budget threshold. This helps us avoid situations of sell-outs on our preferred situations. Please explain your firm's experience and strategies employed to avoid sell-out situations on preferred stations.
- Broadcast Approval: please provide details of how far in advance approval for campaign activity and sign off for media plans would be needed.
- Please indicate any experience you have in securing benefits for your non-profit clients e.g. bonus airtime, PSAs etc. Note that UNHCR Canada is not a charitable entity, we are qualified donee under CRA rules.
- Please share sample as below and explain each sample in terms of how they fit into the requirements above.
 - One (1) sample campaign management report

2.1.3 Reporting and Analysis

- Provide weekly time-stamped consolidated data file formatted correctly and uploaded directly to the TV Squared platform
- Participate in bi-monthly check in meetings
- With all DRTV partners, participate in quarterly planning meetings assessing health of overall program, new avenues for expansion and growth, providing in depth analysis of activities in previous quarter
- On a weekly basis, we require that you provide a time-stamped consolidated data file. This consists of a list of every spot which has aired, its date and time, station creative etc. and the consolidated audience figures for each spot.

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- You will also be required to report on all final costs and reconcile dubs costs to add into the All Cost Summary.
- Reporting is consolidated and prepared by our agency DTV including consolidation of response data. This is shared bi-monthly, one mid-way through the month and a final monthly report approximately 3 weeks after the end of the month.
- A monthly all partner meeting is held to review the results of previous wave and inform results from testing and suggested revisions to the media plan.
- Please share sample as below and explain each sample in terms of how they fit into the requirements above.
 - One (1) sample of an analysis report;

2.2 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.

2.3 Compliance with the Government Requirement

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

2.4 Subcontracting

Please be informed subcontractor relationship is allowed. The 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. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. The winner bidder will be the contracted party, responsible for performance.

Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

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3 Content of the Technical Offer

Pre-selection criteria (mandatory to fulfil with this criteria):

In order to be eligible to participate at this bidding, your company has to have local office in Canada and your company has to be authorized to work / do business in Canada. In order to establish compliance with this criteria, company profile and registration certificate are to be sent. Failure to comply with these pre-selection requirements, will result in disqualification. Only offers compliant with this Yes or No criteria will be considered for evaluation.

The evaluation will be carried out separately on technical and financial level. Please make sure the all requirements are included into your proposal.

You should present your proposal in English.

IMPORTANT: No financial information should be included in the technical proposal.

3.1 Company qualifications

It is considered essential for the agency to comply with the following requirements to participate in this RFP (Request for Proposal). During the technical evaluation, in this section, the panel will score your company's (1) *financial soundness and stability*, (2) *TV media buying service provision experience in the DRTV sector*; and (3) *DRTV experience in the non-profit sector*:

(1) Financial soundness and stability:

- Last balance sheet, last year audit reports or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company's financial soundness and stability.
- Year founded
- 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;
- Total number of clients, please provide a list;
- Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

(2) TV media buying service provision experience in the DRTV sector:

Proven track record on the number of years working in the DRTV media buying sector. Please list the number of years in DRTV media-buying experience and your clients, past and present.

(3) DRTV experience in the non-profit sector:

Proven track record on the number of years working in the non-profit sector. Please list the number of years in DRTV media-buying within the non-profit/charity sector.

3.2 Proposed services

During the technical evaluation, in this section, the panel will score (1) *the comprehensiveness of the proposal*, (2) *your company's compliance regarding the required services listed under section 2 (requirements) and the capacity to manage the proposed budgets* and (3) *account management, reporting provisions, as well as any innovative strategies to maximize the ROI on the program*:

- Your proposal is to be tailored as per requirements and information requested under different points of section 2, to ease the evaluation process. General company profile will not be accepted.
- Describe your strategy to deliver on or exceed on annual budgets whilst maximizing ROI
- Please explain any innovative suggestion your company has, in terms of campaigns, reporting,

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spot purchasing (including non-linear TV media purchasing) or any other strategy aimed to acquire quality, long-term committed high life-time value donors and reduce the attrition rate through our media buying strategy.

- Please provide the following samples:
 - One (1) sample media plan
 - One (1) testing plan
 - One (1) sample campaign management report
 - One (1) sample of an analysis report;

3.3 Staff qualifications, account management

Account management is crucial for running a successful DRTV campaign. This section is dedicated to measure the proposed customer service towards PSP Canada 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 provide short biographies of core staff who will be working on the account with a clear indication of the number of years of relevant work experience they have.

Please make sure you elaborate on this section properly, to understand the level of support proposed for managing our account.

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 July 2018 update (ANNEX D) and send back the signed version (each page initialed and dated) along with your technical proposal.

3.6 Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) send back the signed version (each page initialed and dated) along with your technical proposal.

3.7 Content of Your Financial Proposal

Please use only Annex B (Financial Offer) to provide your corresponding fees and cost breakdown.

Pricing and Fees

- Please indicate the appropriate invoicing process (e.g. pre-bill or post-bill media air time).
- Please directly and clearly articulate if and which mark-ups your company applies to 3rd party costs. If you outsource any portion of your services, explain which, if any, costs are marked up by your firm, and the methodology for the mark up.
- Please explain your fee structure and philosophy regarding agency compensation best practices.

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4 Technical and financial evaluation

Pre-selection criteria (mandatory to fulfil with this criteria):

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The evaluation will be carried out separately on technical and financial level. Please make sure the all requirements are included into your proposal.

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 15 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (2.5 points)	<p>Last balance sheet, last year audit reports or any financial statement, public audit, risk scores given by qualified companies to enable UNHCR to assess your company's financial soundness and stability.</p> <p>List of current and previous clients from non-profit and for-profit sectors.</p>
TV media buying service provision experience in the DRTV sector (10 points)	<p>Proven track record provided the number of years in TV media buying service provision experience in the DRTV sector</p> <p>The scores will be allocated for the number of years in DRTV media-buying experience, based on the evidence provided.</p>
DRTV experience in the non-profit/charity sector (2.5 points)	<p>Proven track record provided the number of years in TV media buying service provision experience in the DRTV sector for non-profits/charities specifically.</p> <p>The scores will be allocated for the number of years in DRTV media-buying within the non-profit/charity sector, based on the evidence provided.</p>
Proposed Services (max 45 points)	Documents, information to be provided to establish compliance with the set criteria
Comprehensiveness of proposal (5 points)	<p>There is not set format for the technical evaluation. Please follow the structure of requirements listed under point 2 to ease the scoring. General company profile will not accepted as technical proposal. Please tailor your offer to demonstrate compliance with the listed requirements.</p>

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Demonstrated capacity and experience to deliver quality services in Account Management/Strategic Media Planning (15 points)	Comprehensive proposal to be presented including all services listed under point 2.1.1. Please include into this section one (1) sample media plan and one (1) testing plan
Demonstrated capacity and experience to deliver quality services in Media planning, buying, implementation and management (15 points)	Comprehensive proposal to be presented including all services listed under point 2.1.2. Please include into this section one (1) sample campaign management report.
Demonstrated capacity and experience to deliver quality services in Reporting and Analysis (10 points)	Comprehensive proposal to be presented including all services listed under point 2.1.3. Please include into this section one (1) sample of an analysis report.
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)	The scores will be allocated based on the average years` of relevant experience of the core people working UNHCR account.

The minimum passing scores of the evaluation is 40 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.

Companies may be requested to deliver a presentation based on their technical proposal via WebEx.

The dates for the presentations will be communicated in time.

4.2 Financial Evaluation

The max score allocated to the financial components is 30% (of the total scores), i.e. max 30 points. The financial proposal is to be submitted ONLY by filling in Annex B. No other format will be accepted. The maximum number of points will be allotted to the lowest price offer (media buying and any additional fees) that is opened and compared among those invited firms. All other price offers will receive points in inverse proportion to the lowest price.

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5 Customer responsibilities

PSP Canada will be responsible for:

- Appointing a dedicated project manager;
- Providing information and content about UNHCR's mission and activities;
- Providing creative materials;
- Provisioning response mechanisms (call centre, web, mobile) with testing parameters (short-codes, Toll Free numbers) as requested 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.

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6 Key Performance Indicators

6.1 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;
- Cost per donor;
- Ratio of monthly donors acquired versus one-time gift donors;
- ROI on media spend;
- Cost per spot;
- Cost per thousand;
- Response Rate