



**Welcome the stranger.
Protect the refugee.**

Request for Proposal

Digital Engagement Program Support

Issue Date: Wednesday, September 21, 2022

Closing date and time: Thursday, October 20, 2022 - 23:59 hrs. Eastern Daylight Time (EDT)

Request For Proposal (RFP) ID: "Digital Engagement Program Support"

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1. INTRODUCTION TO HIAS

HIAS is a nonprofit organization incorporated in New York State and headquartered in Silver Spring, Maryland, and is exempt from federal income tax under Internal Revenue Code Section 501(c)(3). HIAS advocates for the protection of refugees and assures that displaced people are treated with the dignity they deserve. Guided by our Jewish values and history, HIAS brings more than 130 years of expertise to our work with refugees.

2. REQUIREMENTS

HIAS invites qualified goods/service providers (referred to herein as “Applicants”) to make a firm offer for the provision of travel management services.

HIAS seeks to establish a contract with a creative and strategic partner who can support our current and future needs of our digital engagement program. We require a partner who will bring new ideas to the table and help grow our digital efforts – a true thought partner.

The Applicants are therefore requested to quote under this RFP the total price as well as a breakdown of the specific amounts in Annex IV. Upon signing of the contract, the quoted prices shall be binding on the goods/service providers (herein referred to “Contractor”) for the duration of the contract. The quoted price will be accepted by both HIAS and the Contractor until expiration or termination of the contract.

3. ACKNOWLEDGMENT

HIAS would appreciate you informing us of the receipt of this RFP by return e-mail to procureinquiry@hias.org as to:

- a) Your confirmation of receipt of this RFP and
- b) Whether or not you will be submitting a Proposal

Please include the RFP ID, located at the top of this document, in the Subject line.

4. PREPARATION OF PROPOSALS

a. Documents Comprising the Proposal **to be Submitted:**

- (i) Proposal Submission form (Annex V)
- (ii) Price Schedule (Annex VI)
- (iii) Technical Details: detailed description of the essential technical and performance characteristics of the goods
- (iv) Customer References: at least two references from prior customers for which similar goods/services to that contained in this RFP were provided

- b. Key Personnel: If Key Personnel (individuals who are specifically and uniquely important to the proposed work) are named in the Applicant’s proposal, the Applicant will do so in “good faith”. Good faith means that the applicant

communicated with the proposed key person, obtained a commitment that they would work on the contract and that the person consented to being identified in the applicant's proposal to hold a given position. If the Applicant learns during the course of the procurement, before award, that one or more Key Personnel will not be able to work on the potential award, the Applicant must notify HIAS immediately.

- c. **Demonstration:** If provided in the Proposal Data Sheet, HIAS shall require Applicants to provide a live demonstration of the proposed goods/solution. If the Applicant has already provided HIAS with a demonstration, a further demonstration may still be required. The applicant shall provide the demonstration free of charge and HIAS shall not accept any liability for any damage to or loss of Applicants' property in connection with such a demonstration.
5. **REQUESTS FOR CLARIFICATION**
Applicants are required to submit any request for clarification or any question in respect of this RFP by e-mail to procureinquiry@hias.org. Please include the RFP ID in the Subject line. The deadline for receipt of questions for any clarifications is **23:59 hrs. EDT time on Thursday, October 6**. Applicants are requested to keep all questions concise and to exclude language as to the applicant's identity as the questions and responses will be posted publicly.
6. **PROPOSAL SUBMISSION DEADLINE**
Proposals must be delivered to the email address and on or before the time and date specified in the Proposal Data Sheet (Annex I). **Late Proposals shall be rejected.** If the responses received for this RFP are insufficient to conduct a fair and competitive evaluation, the RFP may be reposted with a later due date with or without changes.
7. **DISCLAIMER**
This RFP is not to be construed in any way as an offer to contract with your organization.

Sincerely,

Theron Jurkowski

Theron Jurkowski
Director, Contracts & Procurement

Annex I: PROPOSAL DATA SHEET

The following specific data for the goods to be procured shall complement, supplement or amend the provisions in the General Instructions to Applicants. Whenever there is a conflict, the provisions herein shall prevail over those in the General Instructions to Applicants.

Relevant clause(s) of Instruction to Applicants	Specific data complementing, supplementing, or amending instructions to Applicants
Language of the Proposal	English
Proposal Price Currency	USD
Evaluation Criteria	Best Value
Documents Establishing Applicant's Eligibility & Qualifications	<input type="checkbox"/> Required <input checked="" type="checkbox"/> Not required.
Proposal Validity Period	120 days after the Deadline for Submission of Proposals
Demonstration	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required.
Deadline for Requests for Clarification	23:59 hrs. EDT time on 10/06/2022
Deadline for Submission of Proposals	10/20/2022 - 23:59 hrs. Eastern Daylight Time (EDT)
Electronic Submission of Proposals	<input checked="" type="checkbox"/> Allowed <input type="checkbox"/> Not allowed
Email Address for Submission	procureinquiry@hias.org
Preliminary Examination — Completeness of Proposal.	<input type="checkbox"/> Partial Proposals permitted. <input checked="" type="checkbox"/> Partial Proposals not permitted.
Documents to be Submitted	(i) Proposal Submission form (Annex V) (ii) Price Schedule (Annex VI) (iii) Technical Details (iv) Customer References: at least two
Additional Requirement	
Required Start Date for Performance	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes_January 2023

Award Methodology: HIAS shall award the contract to the Applicant based on Best Value per the factors below :

Evaluation Methodology Factors	Weighting
1.1 Cost – Life cost of product	20%
1.2 Quality - Degree to which the goods, works, non-consulting services, or consulting services meet or exceed the requirements	30%
1.3 Risk – Level of risk and methods for mitigation	10%
1.4 Sustainability - Economic, environmental, and social benefits in support of the project objectives; may include the flexibility of the Proposal to adapt to possible changes over the life-cycle	10%

1.5	Innovation - Innovation in the design and/or delivery; solutions that exceed the requirements or alternative solutions that could deliver best value	30%
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Annex II: GENERAL INSTRUCTIONS TO APPLICANTS**A. Introduction**

1. General: HIAS invites Proposals for the supply of goods or services.
2. Eligible Applicants: Applicants must not be associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates that have been engaged by HIAS to provide consulting services for the preparation of the design specifications or other documents to be used for the procurement of goods/services to be purchased under this RFP.
3. Cost of Proposal: The Applicant shall bear all costs associated with the preparation and submission of the Proposal and HIAS will not be responsible or liable for those costs, regardless of the conduct or outcome of the RFP.

B. RFP Documents

1. Examination of RFP Documents: The Applicant is expected to examine all instructions, forms, terms and specifications contained in the RFP Documents. Failure to comply with these documents will be at the Applicant's risk and may affect the evaluation of the Proposal.
2. Clarification of RFP Documents: A prospective Applicant requiring any clarification of the RFP Documents may notify HIAS in writing. The response will be made in writing to any request for clarification of the RFP Documents that it receives earlier than one week before the Deadline for the Submission of Proposals. Written copies of the response (including an explanation of the query but without identifying the source of inquiry) will be sent to all prospective Applicants that have responded to the RFP Documents.
3. Amendments of RFP Documents: HIAS may, for any reason, amend the RFP Documents, whether at its initiative or in response to a clarification requested by a prospective Applicant. All prospective Applicants that have received or acknowledged receipt of the RFP Documents will be notified in writing of any amendments. To afford prospective Applicants reasonable time in which to take the amendments into account in preparing their Proposals, HIAS may, at its discretion, extend the Deadline for the Submission of Proposals.

C. Submission of Proposals

1. Procurement Ethics: It is HIAS's policy that Applicants/Suppliers observe the highest standard of ethics during the procurement process and execution of such contracts. HIAS shall reject a Proposal if it determines that the Applicant, or any of its personnel, agents, consultants, subcontractors or goods/service providers, has, directly or indirectly, engaged in corrupt, fraudulent, collusive, coercive or obstructive practices in competing for the contract in question. HIAS may also declare the Applicant ineligible for participation in future procurement and award of contracts, either indefinitely or for a stated period. An Applicant/Supplier who offers any gift of any value to HIAS staff will be considered to be

influencing the procurement process. HIAS shall reject a Proposal if it determines that any such gift has been offered.

2. Suspension and Debarment: HIAS will not make purchases or obtain services from people or companies on suspension, debarment, or other sanctions and watch lists, including, but not limited to:

- The U.S. System for Award Management (SAM);
- The U.S. Treasury Office of Foreign Asset Control (OFAC);
- The UN Consolidated Sanctions List;
- The World Bank Listing of Ineligible Firms & Individuals;
- European Union Sanctions List.

A suspension and debarment check will be performed at the time of proposal and then again at the time of contract preparation.

3. Conflict of Interest: An Applicant shall not have a conflict of interest that could call into question its participation in the procurement process and award of contract. Applicants shall disclose any potential or actual conflict of interest at the time of Proposal and during the execution of any contract. All Applicants found to have a conflict of interest may be disqualified.
4. Joint Venture: Where a joint venture or any other form of partnership (together, JV) approach is proposed, Applicants are required to provide full details of the JV and nature of the relationship with other members.

Applicants forming a JV shall nominate an authorized representative of the JV (duly evidenced by submitting a power of attorney signed by a legally authorized representative of the JV) who shall have the authority to conduct all business for and on behalf of all members and enter into the contract.

5. Modification and Withdrawal of Proposals: The Applicant may withdraw its Proposal after submission, provided that written notice of the withdrawal is received by the HIAS before the deadline for submission. No Proposal may be modified after passing of the Deadline for Submission of Proposals. No Proposal may be withdrawn in the interval between the Deadline for Submission of Proposals and the expiration of the Period of Proposal Validity indicated in the Proposal Data Sheet.

D. Evaluation of Proposals

1. Preliminary Examination:
 - (a) Before the detailed evaluation, HIAS will determine the substantial responsiveness of each Proposal to the RFP. A substantially responsive Proposal is one that conforms to all the terms and conditions of the RFP without material deviations.

- (b) HIAS will examine the Proposals to determine whether they are complete, whether any computational errors have been made, whether the documents have been properly signed, and whether the Proposals are generally in order.
 - (c) Arithmetical errors will be rectified on the following basis: If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If the concerned Applicant does not accept the correction of errors, its Proposal will be rejected. If there is a discrepancy between words and figures, the amount in words will prevail.
 - (d) A Proposal determined as not substantially responsive will be rejected by HIAS and may not subsequently be made responsive by the Applicant by correction of the non-conformity.
- 2. Award Methodology
 - a. See **ANNEX I: PROPOSAL DATA SHEET**

E. Award of Contract

- 1. HIAS reserves the right to accept or reject any Proposal, to annul the RFP process and reject all Proposals at any time before award of contract, without thereby incurring any liability to the affected Applicant(s) or any obligation to provide justification.

Annex III: GENERAL TERMS AND CONDITIONS

Please find the General Terms and Conditions as a separate file along with this RFP file at:

<https://www.hias.org/requests-proposals>

If you are having trouble with the file, contact procureinquiry@hias.org immediately. Delays with accessing the file will not constitute an extension of the submission period.

ANNEX IV: TECHNICAL SPECIFICATIONS

Required services include:

- Strategy and Program Management
 - Audit of current digital engagement program with a focus on email, website, and paid advertising channels
 - Comprehensive, data-driven digital engagement strategy, including fundraising, advocacy, paid advertising, for the next 12 months
 - Annual revenue and list growth projections, including one round of reforecasting
 - Weekly team meetings
 - Deliverability and list health support
 - Biannual strategy and planning meetings
 - Digital sustainer growth strategy
 - SMS strategy (we do not currently have a program)
- Creative
 - Campaign plans that include multichannel digital efforts
 - Email and website copy for HIAS' fundraising, advocacy, cultivation, and engagement communications (4 major fundraising campaigns / year, 1-2 rapid response emails / month, 2-3 advocacy emails / month, 1-2 cultivation emails / month)
 - Copy and imagery for all HIAS' online advertising efforts
 - Ad hoc copy support
- Implementation and production for all email and paid advertising services outlined above, including associated landing pages
- Reporting
 - Campaign wrap-up reports
 - Monthly report or dashboard that includes all of HIAS' constituency, email messaging, fundraising, website, advocacy, and paid advertising work
- Testing
 - Roadmap for email and website testing
 - Implementation of proposed tests
- Ad hoc bucket of hours for additional support (email template redesign, newsletter strategy and redesign, other services as identified during the audit process, etc.)

ANNEX V: PROPOSAL SUBMISSION FORM

RFP ID.: “Digital Engagement Program Support”

Dear HIAS,

Having examined the Proposal Documents, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to supply and deliver Digital Engagement Program Support in conformity with the Technical Requirements for the sum of [total Proposal amount in words and figures] as may be ascertained following the Price Schedule attached herewith and made part of this Proposal.

We undertake, if our Proposal is accepted, to deliver the goods/services following the Technical Requirements.

We confirm that, based on our current knowledge, there are no real or potential conflicts of interest involved in rendering Services for HIAS. In this regard, we have listed, if any, all the contracts that we have been involved with HIAS as per the attached. Our policy on dealing with conflicts of interest, should these arise, is also set out as per the attached. We acknowledge and agree that HIAS has the right to determine whether there is any actual or potential conflict of interest in its sole discretion.

We agree to abide by this Proposal for 120 days from the Deadline for submission of Proposals. We undertake, if our Proposal is accepted, to initiate the services no later than the date indicated in the data sheet.

We understand that you are not bound to accept any Proposal you may receive.

We agree to the General Terms and Conditions except for (insert titles of the General Terms and Conditions from Annex III and on a separate sheet, detail the likely changes that would be proposed), which we plan to negotiate with HIAS in the event we are the winning applicant.

Name:	Title:
Organization:	EIN, if applicable:
Address:	
Signature:	Date:
Email:	Phone:



ANNEX VI: PRICE SCHEDULE

- 1) The Price Schedule must provide a detailed cost breakdown for each item.
- 2) Technical descriptions for each proposed item must provide sufficient detail to allow HIAS to determine compliance of the Proposal with specifications as per the Technical Specifications of this RFP.
- 3) The following format is recommended for use in preparing the Price Schedule. The format uses a specific structure that may or may not be applicable but is indicated to serve as an example.

NAME OF APPLICANT:					
ITEM	DESCRIPTION	UNIT	UNIT PRICE*	QUANTITY REQUIRED	TOTAL PRICE PER ITEM
GRAND TOTAL					

*Unit price should be based on Delivery at Place (DAP)

Note: In case of a discrepancy between the unit price and total, the unit price shall prevail.

Signature of Applicant