

## Statement of Work

### I. BACKGROUND

The U.S. Mission to the EU is looking to procure a one-year subscription to a social media analytics tool that will help us better understand and gauge the effectiveness of our digital engagement efforts, track the performance of our social media content, better understand and target specific audiences both online and off, and detect and track harmful narratives in our digital space. The procured contract should cover a fifteen month-access period for the analytics tool, with a 3-month period at the start of the contract dedicated to fine-tuning the tool to our purposes and training the necessary staff members to use the tool. The contract will have an annual renewal option for up to five additional option years.

The analytics tool should help us address a number of challenges when it comes to analyzing our social media output and monitoring the digital landscape for relevant content, specifically:

- **Social listening capabilities:** the ability to monitor/track how conversations on specific topics unfold/spread among our target audiences (e.g., what are people saying about us/the US?); measure the real-time evolution of opinion, and identify the topics, networks, and people that can shape it; use AI- and machine learning to monitor for signals of changing beliefs via social, traditional and broadcast media sites; real-time identification of trends, patterns, content, and connections for any topic, no matter the volume of results;
- **Performance tracking:** how our posts performed and which audiences they reached; provide a consolidated view of analytics across multiple platforms to present a complete reporting of reputation and performance of posts; ability to gauge the impact of how our communications strategies are performing by using a standardized measurement mechanism to analyze sentiment to understand how influencers and key stakeholders feel about certain issues; real-time tracking of the reach of our posts; the ability to track how much traffic is being driven to external sites (websites, other platforms, etc.);
- **Influencer tracking:** identify and monitor those users/accounts that help share our content more broadly; display live, interactive maps that show where conversations are taking place and how they are resonating across media; the ability to analyze key stakeholder attitudes or sentiments on a given issue; the ability to identify the people who have the right reach and relevance to amplify our messages;
- **Audience/user behavior analyses:** how we can more effectively define and engage with our target audience; identify the key influencers who are driving a story; ability to identify the point of origin of a story/trend and see how fast and how the story evolves; the ability to measure consumer sentiment/how people think about our brand/messages; the ability to identify the share of voice our audience has and to compare that with the audiences of our competitors;

- **Disinformation Tracking:** ability to identify sources and communities that disseminate disinformation via links, ability to detect bots/automated user accounts, and map how disinformation narratives spread through/by our target audiences; the use of AI-based algorithm to provide real-time updates to how disinformation spreads;
- **Traditional/social media monitoring:** ability to monitor both traditional media accounts and identified social media influencer accounts on specific topics; the ability to curate and circulate cross-media stories from traditional media outlets.
- **Reporting and Alerts:** the tool should be able to create interactive, accurate and customized reports that are easy to generate and share internally, also among non-users of the platform; reporting capabilities should be agile and immediately available; the ability to set-up alerts based on timeframe, volume/threshold, issues or filters so that we are immediately notified to changing trends; the ability to identify reputational risk via predictive alerts.

The tool's AI-driven analytics capabilities should cover at a minimum the following social media platforms: Twitter, Facebook, Instagram and YouTube. They should also be able to provide monitoring of traditional media outlets, including (digital) print and broadcast sites in defined geographic regions and in various languages. We are specifically looking to cover the EU region and neighboring countries, in English, French, German, and Russian.

## II. SCOPE OF WORK

### 1. Tool capabilities

- **Scope:** The analytics tool selected should provide robust AI-driven analytics for Twitter, Facebook, Instagram, and YouTube, including access to historical data. It should also be able to provide monitoring capabilities with identified traditional (print and digital) media outlets, as well as broadcast and other online sources to give as complete a picture of our digital landscape as possible.
- **Functionalities:** the tool should include some basic functionalities, including:
  - The ability to track sentiments, reach, mentions, impressions, influences and relevant keywords;
  - The ability to identify trends in geographically-specific regions and in multiple languages (specifically in the EU region and neighboring countries, in English, French, German and Russian);
  - The ability to identify, track, and monitor the performance of specific hashtags that users are using in social conversations;
  - The ability to compare performance between competitor accounts;
  - The ability to compare historical data on various platforms (specifically Twitter) to current trends;
  - The ability to track and monitor disinformation narratives, and to identify bots or automated accounts;

- The ability to map user behaviors and to identify influencers in order to develop these relationships;
  - The ability to map user behavior, specifically the behaviors of users who engage with our accounts, to optimize these relationships;
  - Tool should be user-friendly and intuitive to use, based on ratings from embassy users during the demo of the product.
- **Personalization:** USEU should be able to work with the Quoter to personalize the tool as related to our defined business objectives. This includes:
  - The ability to define or hone into a specific geographic area for monitoring/analysis, particularly for audience data;
  - The ability to input an unlimited number of users' accounts for tracking and monitoring purposes;
  - The ability to track and monitor an unlimited number of sentiments around defined topics (for instance, around specific legislative files, keywords, etc.);
- **Reporting:** The tool should be able to issue customized automated reports and alerts.
- **Dashboards:** USEU should be able to create targeted dashboards for specific identified topical queries (for instance, energy security, China, etc.), as well as track and monitor a general overview of the performance of content from our own accounts.
- **Historical Data:** The tool should include access to historical data, up to 5 years prior to signing the contract. The tool should give access to at least 5 users with no additional costs
- **Dashboards/Channels:** The tool should cover the creation of at least 10 topical dashboards/channels

## 2. Training and Personalization Plan:

The Quoter should provide a training and personalization plan that details the timeframe in which it will take to get USEU trained and the platform personalized to respond to our business needs. The Quoter should be clear about what data would be required from USEU in order to maximize the effectiveness of the tool. The plan should be presented in the following format, indicating the length of time each stage of the process would require within the onboarding process:

### A. Onboarding process (estimated timeframe (1 week/2 weeks/1 month...))

- Project Audit and Customization (1st week): during this period, Quoter is responsible for providing initial access to all USEU users. USEU will work together with the Quoter to confirm and refine the scope of the tool (i.e., defining keywords, targeted handles, media types, campaigns, hashtags, etc.) and outline our business objectives. This should include an initial training in order to start customizing the data analysis.

- Validation and Optimization: Quoter should follow-up with USEU to ensure data validity and that the current set-up aligns with our business objectives. During this period Quoter should work with USEU to develop automated reports, alerts and dashboards based on our requirements.
- Implementation: Quoter should conduct end user trainings with all USEU staff to go through the tools of the platform, explain how to extract insights, and answer additional questions.

#### **B. Maintenance**

- Quoter should have a dedicated case manager remotely available to USEU during normal business hours (8:00-19:00 CET) for the duration of the contract who would be able to answer questions or aid in back-end adjustments to the dashboards in order to ensure maximum effectiveness. Queries should be answered within 24 hours of being sent.
- (Optional) Preference for a product that includes static user guides or help desks that can be consulted as needed.

#### **C. Review and Modification**

- Quoter should plan for an annual review of the tool, which includes the opportunity to modify the business objectives and adjust the dashboard customization to newly identified areas of interest.

### **3. Access to a Trial Demo**

As part of the bid, Quoter should provide USEU with access to a personalized demo that at least five (5) users are able to access to see first-hand the functionality of the tool and how intuitive it is. This demo should include a 1-hour call with a representative of the company who would be responsible for going through the tool to explain the different functionalities, as well as a 1-week period during which the users can continue exploring the tool on their own time. That week will be August 31-September 4, 2020.

## **III. PERIOD OF PERFORMANCE**

The procured contract should cover a fifteen month-access period for the analytics tool, with five additional option years. There should be a 3-month period at the start of the contract dedicated to fine-tuning the tool to our purposes and training the necessary staff members to use the tool. The contract should also include a dedicated case manager for the duration of the contract to assist us in technical issues, available during standard business hours from 8:00-19:00 Central European Time.

## Evaluation Instructions, Factors, and Methodology

### I. INSTRUCTIONS TO QUOTERS:

To be considered, the Quoter must submit the required below information on or before **16:00 pm** Central European Time **on (August 28, 2020)**. The Quoter shall provide an electronic copy containing all required volumes of the written quote. The Quoter shall submit the quote in English in the format provided, in Microsoft Office 2007 or later. The Quoter shall submit their quote to the following individuals via [BrusselsBids@state.gov](mailto:BrusselsBids@state.gov).

**Name:** Lisa Liao  
**Title:** General Service Officer  
**E-mail:** [BrusselsBids@state.gov](mailto:BrusselsBids@state.gov)

and

**Name:** Brigitte Swietek  
**Title:** Procurement Agent  
**E-mail:** [BrusselsBids@state.gov](mailto:BrusselsBids@state.gov)

The Quoter shall also submit the offer marked "social media analytics tool Offer - PR9337639 Enclosed" to the U.S. Embassy, Attn: Contracting Officer, Regentlaan/Bd. Du Régent 27, 1000 Brussels on or before 16:00 Hrs. on **August 28, 2020**. No offers/quotes will be accepted after this time.

The successful offeror shall be registered in the SAM (System for Award Management) <https://www.sam.gov> database prior to contract award pursuant to FAR provision 5.207. Therefore prospective offerors are encouraged to register prior to the submittal of their proposal. The guidelines for registration in SAM are also available at: [https://www.fsd.gov/fsd-gov/learning-center-system.do?sysparm\\_system=SAM](https://www.fsd.gov/fsd-gov/learning-center-system.do?sysparm_system=SAM).

Upon receipt of the quote, the Mission will contact the designated company representative to schedule a 1-hour virtual demonstration of the tools with the team from the Mission. The elements, organization, and page count limitations associated with the Quoters' quote are described in the below table. Quoters shall use this classification depicted in the table below for the volumes, headings, and sections titles.

<b>Heading</b>	<b>Section Title</b>	<b>Page Count Limitation (if necessary)</b>
A	Tool Capabilities	15 pages
B	Training and Personalization Plan	5 pages
C	Technical Support	2 pages
D	Price Quote	2 pages

Note that for each item listed above, pages exceeding the page count limitation will not be evaluated by the Government and will be appropriately disposed of prior to evaluation.

The elements listed below are not included in the page count limitations. Quoters are reminded that any information conveyed by the elements below is excluded from evaluation and page restrictions: cover, dividers, transmittal letter, table of contents, list of figures, list of acronyms etc.

- a. Tool Capabilities
  - The Quoter shall submit a clear and complete description of the tools to be provided and a proposed plan of action for performance of the required work (including critical review of the statement of work objectives). The plan of action shall be comprehensive, implementable, and creative in meeting the requirements of the scope of work. The plan must include a description of the capabilities of the tool for the points outlined in *Section II / 1. Tool Capabilities*.
- b. Training and Personalization Plan
  - The Quoter should prepare a training, onboarding and personalization plan for the timeframe it will require for USEU to be able to implement and begin using the tool (see *Section II / 2. Training and Personalization Plan* for more details). This should also include any data that USEU would need to provide (objectives, keywords, handles, lists, etc.) that would help the Quoter optimize the tool to our business needs.
- c. Technical Support:
  - The Quoter should outline what technical support would be available to USEU users for the duration of the contract.
- d. Price Quote (Volume 2)
  - The Quoter should provide a comprehensive price quote for the one-year contract, as well as payment timelines. The quote should clearly outline any limitations on the contract (for instance, number of users, number of dashboards, training time, etc.).

## II.EVALUATION CRITERIA:

This Acquisition shall be evaluated using an adjectival (Outstanding, Acceptable, Unacceptable; or Confidence, Unknown Confidence, No Confidence) rating scheme. The basis of award shall be Best Value using Tradeoffs, price and non-price factors considered. The factors are in descending order of importance.

**Please Note:** All other factors, when combined, are significantly more important than price.

### 1. Technical Evaluation Factors:

#### Evaluation Criteria:

The Quoter shall be evaluated on its:

1. Tool Capabilities
2. 1-hour Tool Demonstration
3. Training and Personalization Plan
4. Technical Support

## 5. Price Quote

The Government shall use the following adjectival ratings to evaluate the “Organization Experience” Factor: Outstanding, Acceptable, and Unacceptable.