

Annex A: Terms of Reference
RFP/2019/036

Request for proposal for the delivery of fundraising analytics platform services

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1 Introduction

1.1 Background

UNHCR has the fastest growing international private sector fundraising programme in the world with ambitious targets. By 2025 UNHCR aims to raise US\$1bn each year.

In 2018 UNHCR Private Sector Partnership (PSP) contributed 11% to the overall budget of the organization with the rest coming from governments. UNHCR has private sector fundraising programmes in 30 countries, including Italy, South Korea, Hong Kong, Canada, The Nederland, Mexico and Brazil.

In six of these countries, UNHCR has partnerships with independent charitable organizations (known as: National Partners). National Partners raise funds for UNHCR and awareness of the refugee cause. They use the UNHCR brand for fundraising purposes and engage directly with donors. UNHCR National Partners operate in: Australia (Australia for UNHCR), Germany (UNO Flüchtlingshilfe), Japan (Japan for UNHCR), Spain (Espana con Acnur), Sweden (Sweden for UNHCR), USA (USA for UNHCR), the UK (UK for UNHCR)

Since 2012, PSP has been working with external suppliers on an ongoing basis to undertake Lifetime Value (LTV) analysis (henceforth, the “LTV project”) and produce benchmarks that are rigorously comparable across recruitment methods and national fundraising operations. Data consistency is at the heart of the project and the analysis is currently derived from a data warehouse pulling together comprehensive transactional and donor information from national donor database systems (to the exception of fundraising cost data, that is currently derived from financial reports and not directly available in the donor database systems).

In the current setting, the data warehouse is refreshed twice a year with the goal to refresh more often, up to a daily feed, to supply up-to-date performance reports and guide fundraising operations and investment decisions.

Data collected in the repository excludes any personal information e.g. Donor name and address.

The project also delivered a forecasting and budgeting tool (henceforth, “Crescendo”) that was embed in the planning process of year 2014 as a pilot and enhanced over the years. National operations involved in the LTV project uses the forecasting tool to identify best fundraising options and translate those in their annual and long-term plans. The tool is also used by Regional Managers and members of the Investment fund committee to evaluate the level of relevance of National Growth Funds applications, by comparing historic track records against the objectives set in the investment fund applications submitted for the following year.

As of 2019, there are 14 national fundraising operations involved in the project. Those 14 national fundraising operations cumulatively raised over 90% of IG income in 2019.

1.2 Statement of Purpose & Objectives

UNHCR Private Sector Partnerships (PSP) is seeking to enter into a Frame Agreement (FA) with external service provider(s) for the maximum period of thirty-six (36) months for attribution and optimization services with the possibility of two times twelve (12) months extensions, subject to satisfactory performance.

It is expected that the service provision may start by 1st of May 2020.

UNHCR Private Sector Partnership has the following objectives by having this frame agreement in place:

- Provide in-depth information on the performance of UNHCR fundraising activities at country level and globally. Expected outcomes are:
 - at a country level, produce a comprehensive picture of our donors and provide detailed, customizable automated reporting and visualization of our fundraising programs so that managers and data analysts can:
 - model different investment scenarios for growth and optimise acquisition and retention activities;
 - develop segmentations and or propensity modelling for campaigns, appeals and fundraising activities by identifying our best donors;
 - extract insights to help inform decisions around value, revenue and cost optimization;
 - develop strategies, based on our data, to acquire, retain, upsell, cross-sell, reduce attrition and develop ask strategies;
 - at a global level, highlight key initiatives that UNHCR should focus on to maximize net long-term income, highlighting current results and potential benefits on the long term if given targets are met.
- Improve the current developed data warehouse and systems to pull together fundraising data not only from local database systems (CRM), but also from Digital Engagement Database available, including and not limited to Google Analytics, globally and locally to broaden the range of analysis and reports obtainable from the centralised data warehouse. Ultimately being able to join online behaviour with offline data to give a 360-degree view of supporters.
- Improve current data supply in terms of:
 - Increase the frequency depending on the needs of the national operations,
 - minimise the effort from National operation in providing the required data,
 - reduce the time and effort needed for the entire supply process, from the data collection and data manipulation to the delivery of required reports and metrics.
- Identify and implement best solutions to empower UNHCR users at global and national level to interrogate the data and undergo ad hoc pieces of research (analysis) on areas not covered in the generic reports.
- Recommend and improve current modelling tools that will allow UNHCR to estimate long term performance of ongoing programs, provide analytical support to undertake ad hoc data analysis projects for specific fundraising activity, markets, or donor segments.

PSP would like to identify qualified companies based on the following three different sets of services:

LOT 1 – Reporting, Data Management and Modelling**LOT 2 - Analysis and data consultancy**

Companies can submit a proposal to LOT 1 and LOT 2 separately. It is not a mandatory criterion to send an offer for both lots. The evaluation of the different lots will be carried out separately on technical and financial level. Please make sure the all requirements per lots are included into your proposal. Please also indicate clearly the services/lots you are bidding for to ease the evaluation process.

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 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.

2 Requirements

2.1 LOT 1 – Reporting, Data Management and Modelling

2.1.1 Fundraising performance reporting

2.1.1.1 Lifetime Value Report

This report should support the analysis by separating out donors based on their initial gift type (Committed Giving donors or Cash donors), but also provide an analysis of the consolidated results for acquisition methods recruiting both types of donors e.g. DRTV and digital activities, that recruit Committed giving donors and Cash donors. The analysis should also cover Major donors¹, Middle value donors², and Emergency donors / gifts.

The report should also provide, especially for digital acquisitions channel, the web behavior prior the donation (integration with Google Analytics).

Measures should be supplied by year of acquisition, and the latest results should be broken down per quarter and / or per month per appropriate.

Further breakdown of the analysis should include, if applicable, breakdown per:

- Value band
- Age band and gender
- Payment method (credit card, debit, Paypal and wallets e.g. Apple Pay)
- Payment Frequency (Monthly, Quarterly, Semi-annually, Annually)
- Response channel (as opposed to contact channel)
- Any other differentiating criteria e.g. digital-responsiveness

The report should provide comparisons for several key criteria, including the following:

- Pre-debit attrition
- Cost per New donor
- Cost per Existing donor
- Recruitment value (initial gift value)
- Month-by-month early retention rates (first 18 months)
- Long term retention (year 2, 3, 4, ...)
- Gross LTV per donor
- Net LTV per donor
- ROI per donor
- Annual revenue per donor and breakdown of income streams (initial gift or pledge vs additional income resulting from upgrade campaigns and special appeals)
- Upgrade % and value per donor, time to 1st and subsequent upgrades, response channel
- Downgrade % and value per donor, time to 1st and subsequent down upgrades, response channel
- Cross-sell % and value per donor, time to 1st and subsequent actions, response channel
- Migration % and value of donors migrating to middle value giving and major gifts
- Skip or delinquency rate

¹ Major donors: >= \$10,000 cumulatively donated in the course of 12 months

² Middle value donors: >= \$1,000 cumulatively donated in the course of 12 months

- Number of development communications via different channels by lifetime year (and their costs).

The analysis resulting from the report should be interpreted in the context of each office's fundraising and donor communications programme to identify opportunities that could lead to improvements in lifetime value, and to identify any underlying trends that each office should be mindful of.

The report should be set in local currency for each market and US Dollar, using agreed UN exchange rates, for benchmarking summaries across several markets.

2.1.1.2 Legacy Reporting

The Legacy report should provide the following outcomes:

Legacies Received

- Legacy income, number of legacies and average legacy value
 - by legacy type (residuary, pecuniary, discretionary, specific)
 - by calendar year
 - by initial recruitment channel (if legacy is from a prior donor)
- % of legacies from
 - prior donor with known pledge
 - prior donor without pledge
 - prior non-financial supporter
 - 'unknown' contacts (not previously on the database)
- Number of months/years from known pledge to realised legacy

Legacy Pipeline

- Numbers of pledgers, intenders, considerers, enquirers
 - by campaign
 - by calendar year
 - by initial recruitment channel (if existing donor)
- Add the following measures to LTV report (to analyse legacy interest by recruitment cohort):
 - % who have pledged to leave a legacy
 - % who are intending/considering leaving a legacy
 - % who have made a legacy enquiry
 - % with a known legacy status (pledgers + intenders + considerers + enquirers)
 - % with notified cases and the ability to show LTV for the cohort with & without the Legacy Income.

2.1.1.3 Reactivation, Upgrade and Conversion analysis

These reports should show the donor behavior and performance after the activity was successfully performed. The analysis aims at identifying the number of reactivated (both committed and RG), upgraded and converted donors by Lifetime Year from the originally acquired cohort. Measure performance of donors from the point of reactivation/upgrade and conversion:

- Identify in which Lifetime Year they reactivate/upgrade/convert
- Able to measure:
 - Attrition
 - Gross LTV
 - Net LTV
 - All the relevant indicators available in the current "standard" LTV analysis

The report should also provide a breakdown by channel / multichannel (linked to the communication who generated the upgrade / conversion).

2.1.1.4 Campaign Analysis Reports

The Campaign Analysis Report should provide the Campaign performance results by audience segment (RFV, persona): total contacted, total responded, response rates, income, average gift value, income per mailed, total cost, ROI.

- More detailed cost input (per appeal)
- Detailed segments of the mailing (dependent on the campaign coding)

2.1.1.5 Benchmarking / in-year report

This report should support the analysis by the purpose of the activity performed in a calendar year. Different recruitment activities have different level of engagement (mail / email / TM), below an example of report. The benchmarking report should also be able to track movement between donor status such as standard to middle -> major -> back.

Special Appeals/e-Appeals <ul style="list-style-type: none"> - Quantity mailed by channel (number of pieces sent) - Total investment - Cost per unit mailed - Number of donations - Cost per donation - Total response rate - Average gift value - ROI 	Conversion of cash donors to RG <ul style="list-style-type: none"> - Total cash donors available for conversion - Total converted donors - Average response rate - Average monthly amount - Total conversion income - Total investment in conversion - Attrition Year 1, Year 2 - Cost per converted donor - Conversion income as proportion of total RG income - ROI 12/24/36 months
Upgrading of RG donors <ul style="list-style-type: none"> - Total RG donors available for upgrade - Total number donors upgraded 1st time - Total number donors upgraded 2nd time - Average response rate - Average monthly upgrade - Total upgrade income - Total investment in upgrading - Attrition Year 1, Year 2 - Cost per upgraded donor - Upgrade income as proportion of total RG income - ROI 12/24/36 months 	Middle donor conversion <ul style="list-style-type: none"> - Number of donors acquired as middle donor - Number of new donors converted to middle donor - Total number of middle donors - Middle donors as % of active donors - Total income from middle donors - Total investment in middle donors - Attrition Year 1, Year 2
Legacy <ul style="list-style-type: none"> - Total numbers of pledgers, intenders, considerers, enquirers - Pledgers, intenders, considerers, enquirers as % of all donors - Total legacy income, number of legacies and average value - Total investment in legacies - Average number of months from pledge to realised bequest 	Reactivation <ul style="list-style-type: none"> - Total RG donors available for reactivation - Total number donors reactivated 1st time - Total number donors reactivated 2nd time - Average response rate - Average monthly after reactivation - Total reactivation income - Total investment in reactivation - Attrition Year 1, Year 2 - Cost per reactivated donor - Reactivation income as proportion of total RG income - ROI 12/24/36 months

2.1.1.6 Lead Generation / Non-Financial Supporters Reporting

This report should support the analysis of the quality of leads generated by a specific channel or communication and understand how these lists perform across different types of conversions. A typical example would be Facebook Ad -> 1Bn Miles Campaign -> Email communication -> Telemarketing Call

In this example, we would want to understand the cost per lead for different Facebook ads, the cost per call, how the leads performed on email metrics (open & click rate, unsubscribe) as well as Telemarketing analysis (conversion rate, average gift). Once the lead has been converted, we should be able to analyze future behaviors to inform and report on:

- Best time to approach the lead for conversion (immediately or after a period)
- Best channel mix
- Lead conversion rate and measures mentioned in the Lifetime Value Report paragraph

This report should also allow analysis on non-financial supporter and able to track:

- The number of non-financial supporters in the file (following the global definition).
- Their level and type of engagement (how we have been communicating with them, how did they respond)
- Estimate the conversion rate overtime by channel.

This would require collecting info about not financial engagement, for example petitions, e-newsletters sign ups, volunteering, legacy engagement.

2.1.1.7 Email Reporting

This report should track the engagement with our email communication across the different channels, including basic metrics such as Opt in rates, Open Rate & Click Through Rate, as well as being able to measure how donors are engaging overtime. The report should measure the retention and activity by audience segment from the moment of acquisition, with a breakdown of email metrics by demographic and donor information. Ultimately the report should support the analysis on the impact of the email communication on the donor engagement in other channels.

2.1.1.8 Quarterly and Annual reports

The report should be focused on strategic performance indicators to provide a high-level assessment of fundraising programs on quarterly and annual basis looking at revenue, expenditure and donor metrics, matching predefined reporting criteria from UNHCR HQ.

Deliverables should include the following:

- Track gross and net income per donor (annual average value)
- Comparison with previous years

The development of this report may require changes on the data load / data requirements at source in order to accommodate requirements on how expenditure should be allocated and analyzed. A review of this data capture may be required across all markets.

2.1.2 Data supply process and quality management

The key objective is to act on data quality in order to improve the quality of the resulting analysis and level of consistency across national operations. As a direct outcome, it is expected that the data

supply process can be completed easily and rapidly, enabling PSP to access fundraising information in a timelier manner.

Deliverables should include the following:

- Improve the current data supply process in order to allow a more frequent supply, up to a daily feed should the markets require such frequency. This may require the creation of a framework to help offices document their extraction process and automate data refresh.
- Clear supply process in all key phases, data requirements and guidance notes on how to fulfil the requirements
- Ad hoc support to national operations to elaborate the relevant processes and documentation
- Clear diagnostic reports in a “language” that can be easily understood by users e.g. Excel, Power Bi, Web App report
- Inventory of issues met, and solutions identified / implemented to solve the issues
- Recommendation on how to improve data quality at national level in the future
- Global recommendation on how to improve data quality in the future
- Improve collection of costs from the network

2.1.3 Access to source data

The key objective is to identify and to empower UNHCR users at global and national level to interrogate the data and undergo ad hoc pieces of research (analysis) on areas not covered in the generic reports.

Deliverables should include the following:

- Needs assessment in consultation with users / stakeholders at global and national level
- Recommendation of relevant solutions and implementation
- Training and ongoing support to users to ensure knowledge transfer
- Recommendation and support to integrate the solution within UNHCR environment

2.1.4 Propensity models

Propensity modelling would be developed to determine optimal investment opportunities to solicit our donors and prospects. This will involve scoring the database on various criteria to allow prediction of behaviour related to campaigns, deepened engagement and progression through the donor lifecycle. This may involve ad hoc data analysis projects for specific fundraising activities and/or donor segmentation e.g. Mid Value Donors and Emergency Donor to identify best engagement strategy and ask level force each donor in the file (personalised approach)

Use of new technology such as Machine Learning is considered added value and all infrastructure and level of support needed to incorporate such technology in building propensity models should be clarified and detailed in the proposal.

Projects will be implemented in close collaboration with global fundraising specialists and fundraising managers operating at national level, requiring that the supplier appointed relies on its own network of specialists in a broad range of fundraising areas e.g. retention, upgrade, cross-sell and middle giving donor strategy.

2.1.5 Forecasting and Budgeting tools

The objective is to estimate the long-term performance of ongoing programs based on data modelling and develop medium term income and expenditure projections in the frame PSP annual planning exercise. A data modelling / scenario planning tool was developed to help offices identify

best long-term fundraising scenarios. This model will need to undergo improvements on an annual basis based on users' feedback and evolving needs. Also, it should be able to support users/markets during their planning exercise therefore one of the required outcomes of the tool should be a report mirroring exactly the internal budget pack as designed at global level.

Deliverables should include the following:

- Clear user's guide and updates on how to use
- Technical developments to upgrade the model when required
- Generate views and reports matching predefined criteria set up by UNHCR HQ in the annual planning cycle
- Periodic recommendations on how to improve the model in the future

2.2 LOT 2 – Analysis and data consultancy

Key objectives:

- Ongoing support with the interpretation and disseminations of the analysis performed via the reporting system and tools detailed in section 2.1.
- Undertake ad hoc data analysis projects where key opportunities or issues have been identified for specific activity or markets. Such projects could include looking at attrition, development of a segmentation model, audience profiling or analysing the effectiveness of an activity e.g. an appeal programme or activities launched in the context of a major humanitarian emergency.
- Provide technical and strategic support on how to set up the analytical framework to maximise the use by the markets based on the tools and software available in UNHCR. Support data integration between the centralised data warehouse and forecasting tools with other UNHCR analytical systems. This may require scoping exercise and recommendations on best solutions applicable.

3 Additional information to be considered for bidding

3.1 Overall data selection for reporting

Data will be supplied from each of the participating national operations to an agreed specification between the supplier and UNHCR.

a. Type of supporter record

The analysis should be focused but not limited to individual donors only. High net worth individuals (US\$1 million+), Small business Companies, trusts and foundations could also be included in the data feed, but they should be clearly identified and possibly analysed separately.

Non-financial supporters should also be included in the data supply by the markets.

Anonymous records and gifts should be included in the data supply and counted in the overall financial performance of a channel. Development of a dedicated solution to handle anonymous donations might need to be implemented.

b. Acquisition channels

Acquisition channels to be included in this analysis follow PSP list of “site codes”³. Further breakdown of the site codes is requested by sub-channel (for example, Email/Paid banners/Web walk-ins/Social media beneath “Digital”, and “Telemarketing/Online/SMS” beneath DRTV).

There are instances where results are NOT properly allocated to site codes. For example, it may be found that an Upgrade action is captured under site code “Special appeals” while it should have been coded under site code “Upgrade”. The analysis should uncover such issues and re-allocate to different site codes when needed. In such case, a report should be supplied to the national operations indications where reallocation was done, to enable the national operation to improve the quality of records captured in the database

c. Type of income

The analysis should examine regular giving (direct debits, standing orders, autogiros, credit cards, EFT payments etc.) and cash donations (credit cards, checks, postal order payments etc.).

Unsolicited donations should be included in the analysis if they are received from individual supporters; however, if they have been allocated to an anonymous record they should be treated separately when analysing the LTV of a donor.

Analysis should allow for legacy income and number of legacy pledgers to be both included and excluded as part of the analysis, as well as major gifts.

Events, trading/merchandise and raffle/gaming income and costs should be excluded from the analysis.

d. Costs

³ List of site codes see Annex 1

Accurate cost per acquisition (CPA) and Cost per warm communication (Donor development) can be provided by site code and sub-channel and year for each country. Such costs should be derived from year-end reports and records in the database on number of new donors recruited, and number of donors contacted.

It is unlikely that actual costs for on-going supporter development have been recorded against an individual's record and a complete contact history may not be available for all markets. Therefore, it is recommended that where a contact history is unavailable a supporter development schedule is supplied i.e. number of special appeals per year, newsletters, conversion/upgrade calls etc. In either case average costs should be applied for each year as supplied by the country for special appeals, newsletters, calls etc.

Guidance on what should and should not be included within costs should be agreed to ensure consistency across markets.

e. Definitions for active/lapsed donors

Active regular donor: a grace period is applied so that a regular donor can skip up to two payments and still be counted as active during the skipped period.

Active cash donors: someone who has made a cash donation in the previous 12-month period.

3.2 Technological Environment

UNHCR has been working on the migration of the current data warehouse into Azure Cloud solutions provided internally and allowing access to the supplier to manage the data warehouse, data models and any other aspects as required.

The solution provides an SQL Virtual Machine within the UNHCR Resource group accessing the resource via VPN. The current solution will also use the Azure Analysis server for the tabular model allowing the creation of reports using excel and PowerBI.

We would like to leverage on the work already done⁴ therefore any proposal or future development should take this into account in order to minimise cost where possible.

3.3 Other

Donor information is captured in different database systems and to-date, there is no global guidance document on how to capture income and cost in database systems. The supplier will be dealing with a great diversity of data formats and database systems hence a need to ensure that data is supplied in a unique format by all participants whatever the database system in use. This is to avoid the need for extensive data manipulation and normalization on the side of the supplier before data can be uploaded in the repository.

There will be several years of historical data for recruitment from face-to-face and/or cold direct mail. Some recruitment channels such as DRTV and online acquisition have been introduced in some countries more recently and so we are looking for initial trends.

Rules for managing anomalies should be created by the supplier and agreed with UNHCR. For example, where an active regular giver has taken a payment break and then resumed their regular

⁴ More info on the current technological landscape can be provided upon request.

giving, perhaps with a different payment method, they should be considered as an active regular giver and should not show as lapsing and then reactivating.

Pick time between June and September where higher support might be requested due to increase need for support from the network. This period coincides with the planning phase for UNHCR and markets would require additional support for fundraising analysis and forecasting activities. This should be reflected in the proposal and explained how this will be managed and the impact on cost if any.

4 Content of the Technical Offer

Your Technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information:

4.1 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) *relevant service provision experience* and (3) *charity experience (working in the for-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.
- Company registration certificate / certificate of incorporation
- 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;

(2) Relevant service provision experience in the for-profit sector:

Proven track record on the number of clients in the for-profit sector.

(3) Relevant service provision experience in the non-profit (charity) sector:

Proven track record on the number of clients in the non-profit (charity) sector.

Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

4.2 Proposed Services

During the technical evaluation, in this section, the panel will score (1) *your company's compliance regarding the required services listed for the relevant lot, under section 2*, (2) *quality of the examples provided*;

- (1) Comprehensiveness of the proposal quality and clarity of interpreting and presenting the required services as listed under point 2. General company profile will not be accepted.
- (2) Clear demonstration on your company's compliance with requirements listed for the relevant lot, under section 2
- (3) Different examples provided

4.3 Project Staff

Account management is crucial to establish a well-functioning working relationship. This section is dedicated to measure the proposed customer service towards PSP 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.

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

4.4 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).

4.5 Applicable General Conditions

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) including it in your submitted Technical Proposal.

4.6 Applicable Special Data Protection Conditions

Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E).

5 Evaluation

5.1 LOT 1 - Technical Evaluation – Reporting, Data Management and Modelling

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (5 points)	<p>Please submit your company's registration certificate/ certificate of incorporation. Please submit last balance sheet, last year audit reports OR any financial statement, public audit, risk scores given by qualified companies are provided to enable UNHCR to assess financial soundness and stability.</p> <p><i>Please note that without these documents, 0 points will be given.</i></p>
Relevant service provision experience in the for-profit sector (5 points)	The scores will be allocated for the number clients (previous and current in total) in the for-profit sector (i.e. private), based on the evidence provided.
Relevant service provision experience in the non-profit sector (10 points)	The scores will be allocated for the number clients (previous and current in total) in the non-profit sector (i.e. charity), based on the evidence provided.
Proposed Services (max 40 points)	Documents, information to be provided to establish compliance with the set criteria
Compliance with the requirements listed under 2.1.1.1 – 2.1.1.4 (8 points)	<p>A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1.1 – 2.1.4 for LOT 1, including:</p> <ul style="list-style-type: none"> • one (1) sample Lifetime Value Report • one (1) sample Legacy Reporting • one (1) sample Reactivation, Upgrade and Conversion analysis • one (1) sample Campaign Analysis Reports <p><i>Please note that without samples, 0 points will be given.</i></p>
Compliance with the requirements listed under 2.1.1.5 – 2.1.1.8 (8 points)	<p>A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1.1 – 2.1.4 for LOT 1, including:</p> <ul style="list-style-type: none"> • one (1) sample Benchmarking / in-year report • one (1) sample Lead Generation / Non-Financial Supporters Reporting • one (1) sample Email Reporting • one (1) sample Quarterly and Annual reports <p><i>Please note that without samples, 0 points will be given.</i></p>
Compliance with the requirements listed under 2.1.2 -2.1.3 (8 points)	<p>A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1.2 -2.1.3 for LOT 1, including:</p> <ul style="list-style-type: none"> • one (1) sample automated data process • one (1) sample best implemented solution <p><i>Please note that without samples, 0 points will be given.</i></p>
Compliance with the requirements listed under 2.1.4 (8 points)	<p>A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.2.2 for LOT 2, including:</p> <ul style="list-style-type: none"> • one (1) sample Propensity model

	<i>Please note that without samples, 0 points will be given.</i>
Compliance with the requirements listed under 2.1.5 (8 points)	A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.1.2 -2.1.3 for LOT 1, including: <ul style="list-style-type: none"> one (1) sample Forecasting and Budgeting tools <i>Please note that without samples, 0 points will be given.</i>
Personnel Qualifications (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 cumulatively from first and second phase of the evaluation is 42 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.

5.2 LOT 2 - Technical Evaluation – Analysis and Data Consultancy

Company Qualifications (max 20 points)	Documents, information to be provided to establish compliance with the set criteria
Financial soundness and stability (5 points)	Please submit your company's registration certificate/ certificate of incorporation. Please submit last balance sheet, last year audit reports OR any financial statement, public audit, risk scores given by qualified companies are provided to enable UNHCR to assess financial soundness and stability. <i>Please note that without these documents, 0 points will be given.</i>
Relevant service provision experience in the for-profit sector (5 points)	The scores will be allocated for the number clients (previous and current in total) in the for-profit sector (i.e. charity), based on the evidence provided.
Relevant service provision experience in the non-profit sector (10 points)	The scores will be allocated for the number clients (previous and current in total) in the non-profit sector (i.e. charity), based on the evidence provided.
Proposed Services (max 35 points)	Documents, information to be provided to establish compliance with the set criteria
Comprehensiveness of proposal (5 points)	Please follow the structure of requirements listed under point 2 to ease the scoring. General company profile will not be accepted as technical proposal. Please tailor your offer to demonstrate compliance with the listed requirements.
Compliance with the requirements listed under 2.2 (30 points)	A detailed section on the technical proposal to prove your agency's compliance with requirements listed under for 2.2 for LOT 2, including: <ul style="list-style-type: none"> one (1) sample Generic Fundraising Performance analysis one (1) sample Ad hoc analysis <i>Please note that without samples, 0 points will be given.</i>
Personnel Qualifications (max 15 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.
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The minimum passing scores cumulatively from first and second phase of the evaluation is 42 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.

5.3 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 1 & 2. No other format will be accepted.

6 Key Performance Indicators

6.1 *Performance Evaluation*

UNHCR will monitor the performance of the selected supplier on a regular basis according to the objectives listed.

7 List of “site codes” in use at PSP

Acquisition

- 1.1. Acquisition Mail
- 1.2. Emergency Acquisition
- 1.3. Reactivation of lapsed donors
- 1.4.1. Face-to-Face AGENCY
- 1.4.2. Face-to-Face INHOUSE
- 1.5. Online donor acquisition
- 1.6. DRTV
- 1.7. Inserts
- 1.8. Acquisition telemarking
- 1.9. Multi Channel
- 1.10. Print Advertisement
- 1.11. Any other acquisition

Donor development

- 2.1 Committed Giving & Recapturing
- 2.2 Renewal
- 2.3 Special Appeals
- 2.4 Emergency Appeals
- 2.5 Upgrade
- 2.6 Conversion
- 2.7 Middle Donor
- 2.8 PSFR - Major Donor
- 2.9 Donor Care & Communication
- 2.10 Online Fundraising From Donors
- 2.11 PSFR Any Other Donor Fr