



ANNEX A: TERMS OF REFERENCE

RFP/24/012/AFRICA/PSP

REQUEST FOR PROPOSAL FOR THE PROVISION OF GLOBAL CROWDFUNDING
PLATFORM SERVICES FOR UNHCR PRIVATE SECTOR PARTNERSHIPS IN AFRICA

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

Table of Contents

1	Introduction	3
1.1	Background	3
1.2	Private Sector Partnerships in Africa	3
1.3	Statement of Purpose & Objectives.....	3
1.3.1	Objectives	4
1.4	Joint venture, sub-contracting	4
	Requirements.....	5
1.5	Campaign services	5
1.6	Reporting and analysis	5
1.7	Account management	5
1.8	UNHCR responsibilities	5
2	Content of your offer and evaluation.....	6
2.1	Technical offer & evaluation	6
2.2	Financial Evaluation	8
3	Key Performance Indicators	9

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

1 Introduction

1.1 Background

The office of the United Nations High Commissioner for Refugees (UNHCR) was created in 1950, after the Second World War, to help millions of Europeans who had fled or lost their homes.

We had three years to complete our work and then disband.

We work in 137 countries and territories, with personnel in a mixture of regional and branch offices and sub and field offices. Staff members work in a diversity of locations and conditions, including in our Geneva-based Headquarters (HQ) and over 100 field locations. For more information, please see <http://www.unhcr.org>

Our teams work hard to help the displaced, specializing in a wide range of disciplines, including legal protection, administration, community services, public affairs, and health.

1.2 Private Sector Partnerships in Africa

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

UNHCR Africa is rapidly growing its fundraising program, with active acquisition programs for individual giving and partnerships. UNHCR Africa recognizes the important role innovative digital activities play in acquiring new donors and retention tactics to nurture our relationships with our existing donors.

1.3 Statement of Purpose & Objectives

UNHCR PSP Africa seeks a frame agreement with qualified service provider(s) for global crowdfunding platform services to support UNHCR PSP Africa to acquire and retain quality donors via various campaigns. The proposed time frame is 24 months (about 2 years) with a potential extension for another period of a 12-month period subject to satisfactory performance.

The global crowdfunding platform will be specifically targeting Muslim communities for the Ramadan, Zakat, Eid Al Adha, regional campaigns focused on Kenya, Nigeria, Ghana, South Africa, Mauritius, and emergency campaigns.

UNHCR PSP Africa is looking for a risk free, high potential crowdfunding platform that will garner more online donations and support from the public especially during the Ramadan month.

PSP Africa might appoint a back-up supplier to set up campaigns in a more sustainable way. The back-up service provider will be activated in case the main one fails to perform or might encounter capacity issues.

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

1.3.1 Objectives

UNHCR's goals are to increase the volume and value of online donations and enhance UNHCR brand awareness.

- Increase the number of online donations.
- Increase average donation and number of online donors.
- Improve donor loyalty and long-time value.

1.4 Joint venture, sub-contracting

Please be informed that joint ventures, or contractor/subcontractor relationships are allowed. In either case, the bidder needs to confirm which company the project is led to take responsibility for the commercial relationship. The bid is to be submitted under one company, as leader. The winning bidder will be the contracted party, responsible for performance. UNHCR will deal with only one party (as single legal entity) for the administration of the contract, in case of selection. Please read carefully UNHCR General Terms and Conditions (Annex D, page 3, clause 5) about subcontracting.

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

Requirements

1.5 Campaign services

- Your platform must be compliant with Payment Security and Processing standards.
- Your platform must ensure data protection and privacy.
- Your company must provide documentation of their cybersecurity measures, including firewalls, intrusion detection systems, and regular security audits.
- The crowdfunding platform must be developed specifically targeting Muslim communities to make a charitable donation, this is the targeted Islamic audience in the frame of UNHCR global campaigns for Ramadan, Zakat, Eid Al Adha, other African regional campaigns, and emergency campaigns; to access a global community of Muslim supporters who are incredibly charitable.
- The crowdfunding platform must offer individual donation options for Islamic charity purposes; as most of the Islamic Crowdfunding platforms available online are capital investment platform, not individual giving platform for fundraising.
- The crowdfunding platform must offer global coverage, i.e., the platform is accessible all around the world, including the Africa region.
- The crowdfunding platform must present a paid marketing opportunity with a high-potential avenue for acquiring online donations and public support with its unique proposition of guaranteeing a return on investment (ROI¹) of 1.0.

1.6 Reporting and analysis

- Availability of reporting and analysis to track different campaign results.
- Possibility to tailor-made reports for UNHCR need.
- UNHCR needs transparent reporting of any security breaches within a specified timeframe (24h max) and a clear action plan for mitigating any potential damage.
- Need for detailed reporting capabilities, including transaction logs, donor analytics.
- If it is possible, please add real-time fraud monitoring and alerts to prevent unauthorized transactions.
- The crowdfunding platform offers a backend system where the UNHCR team can access and download the donor's information with consent for future engagement.

1.7 Account management

- Dedicated account manager assigned to UNHCR to ensure the best possible customer support service.
- Requirement for account management support, emphasizing security practices, for immediate response to any security concerns or breaches.

1.8 UNHCR responsibilities

- Provide existing campaign assets to be adapted to the local market as needed.
- Provide access to UNHCR content and brand guidelines (e.g., images and data) for the elaboration of campaigns, if needed

1 ROI return on investment: performance indicator used for campaign evaluation, based on USD 1, e.g., ROI 2.6 means that UNHCR invested USD 1 and generated USD 2.6 as income.

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

2 Content of your offer and evaluation

Please fill out Annex H as your technical response.

Your offer shall be prepared in English. Your technical proposal should be concisely presented and structured in the following order to include, but not necessarily be limited to, the following information.

No pricing information (i.e., fees) can be added to the technical offer. Please use Annex B (financial offer form) to confirm the overall cost proposal.

Please note that a general company profile or the signed ToR Annex A (this document) will not be accepted as a technical offer.

2.1 Technical offer & evaluation

The following section lists all selection criteria as part of the first yes/no cut. In this regard, <u>your company must be compliant with the below requirements to be considered as eligible for the technical evaluation.</u>	
Company registration documents and general terms and conditions	Documents & information to be provided to establish compliance with the evaluation criteria
Eligibility to do business	<p>Provide (1) <i>your company registration certificate</i> and (2) the dully fill out <i>vendor registration form</i> (Annex C) to prove that your company is eligible to provide services.</p> <p><i>Note: in case your company is an approved service provider to UNHCR, i.e., have valid vendor profile and has received purchase orders before, there is no need to submit the certificate and vendor registration form, unless there is any change to process. Please clearly indicate this information.</i></p>
PCI - DSS compliance to protect cardholder data	<p>Payment card industry compliance refers to the technical and operational standards that businesses follow to secure and protect credit card data provided by cardholders and transmitted through card processing transactions. PCI standards for compliance are developed and managed by the PCI Security Standards Council. PCI DSS Level 1 (at least)– PCI Security Standards Council certificate to be submitted to establish compliance with the criteria. https://www.pcisecuritystandards.org/: Please select ONE of the following options:</p> <ol style="list-style-type: none"> 1. Availability of PCI DSS Compliance certificate²: Level 1, requiring a report on compliance (ROC) and requires an Attestation of Compliance (AOC) 2. Availability of PCI DSS Compliance certificate Level 2, 3 or 4: requiring a self-assessment questionnaire (SAQ)

² Level 1 certificate: Merchants processing over 6 million card transactions per year.
Level 2 certificate: Merchants processing 1 to 6 million transactions per year.
Level 3 certificate: Merchants handling 20,000 to 1 million transactions per year.
Level 4 certificate: Merchants handling fewer than 20,000 transactions per year.

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

	3. On-going process to adopt such protocol to be completed withing 1 year of submission date
Security certification	<p>To implement end-to-end encryptions for all financial transactions to safeguard donor information during transmission; please mark your answer correctly on Annex B (technical response form) and select ONE of the options:</p> <ol style="list-style-type: none"> 1. Availability of ISO 27001 certification 2. Availability of any other relevant security certifications, including the scope of the certification and the certifying body 3. On-going process to adopt such protocol to be completed withing 1 year of submission date
The Technical offer will be evaluated using inter alia the following criteria and percentage distribution: 70% of the total score on a 100 points scale (i.e., 70 points are allocated for the technical component). The following section lists all requirements for technical scoring; only bidders that will score equal or above 42 points (of the 70 points) will be considered for financial evaluation.	
Campaign services (max 35 points to be obtained) as per section 1.5	<p>Provide details and evidence on how your company will provide the services listed under section 1.5. Your proposal must be tailored as per service need listed under section 1.5 to prove compliance. General company profile will not be accepted.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP.</p>
Transaction Security Measures (max 15 points to be obtained)	<p>Please provide documentation/information of your company cybersecurity measures, including but not limited to firewalls, intrusion detection systems, and regular security audits; confirm that your proposed platform has implemented measures for detecting and responding to fraud or any other unauthorized transactions.</p> <p>The scores will be allocated based on the clarity and evidence provided as best security for UNHCR PSP.</p>
Reporting and analysis (max 15 points to be obtained) as per section 1.6	<p>Provide evidence on reporting and analysis capabilities as per section 1.6. Your proposal must be tailored as per service need listed under section 1.6 to prove compliance. General company profile will not be accepted.</p> <p>Please submit at least one (1) campaign result report.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP.</p>
Account management (max 5 points to be obtained) as per section 1.7	<p>Please provide information on the experience of the dedicated account manager assigned to UHCR to ensure the best possible customer support service.</p> <p>Please describe your account management support, emphasizing security practices, for immediate response to any security concerns or breaches.</p> <p>The scores will be allocated based on the clarity and evidence provided as best value for money service for UNHCR PSP.</p>

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

Please note that the following terms and conditions will be applicable for the contractual relationship with the selected vendor; in case of any comments on the below clauses, the negotiation will take place at the contract establishment phase with the involvement of UNHR legal department:

- UNHCR General Conditions of Contracts for the Provision of Services
- UNHCR Special Data Protection Conditions

2.2 Financial Evaluation

The Financial offer will use the following percentage distribution: 30% of the total score.

The maximum number of points (30) will be allotted to the lowest total price calculated based on the prices offered on Annex B. All other offers will receive points in inverse proportion to the lowest price.

The financial proposal is to be submitted ONLY by filling in Annex B. No other format will be accepted. UNHCR is exempt from all direct taxes, with this regard the price must be given without any local taxes.

Bidders are required to submit any request for clarification or any question in respect of this RFP by e-mail to Erzsebet Gal at galer@unhcr.org

3 Key Performance Indicators

UNHCR expects to monitor the performance of the selected supplier on a campaign basis according to the following KPIs:

- ROI;
- Cost per acquisition;
- Average one-off donations;
- Number of donors per campaign;
- Overall teamwork between supplier and PSP Africa;
- Delivery of commissioned work on schedule
- Quality of product and service