**Annex A: Terms of Reference**

**2023_RFP_001**
**UNHCR Digital Service**

**RFP for Salesforce Implementation Partners**

March 2023

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# 1   Introduction

## 1.1   Background UNHCR

UNHCR has selected Salesforce as the platform for CRM implementation of fundraising and relationship management systems. UNHCR has a multi-org strategy for Salesforce, in which there are stand-alone country implementations, as well as two globally managed, multi-tenant Salesforce environments; the Global org, which houses multiple smaller fundraising operations, and the HQ Synergy org, which houses key HQ teams who manage relationships with external partners.

To streamline and standardize the Salesforce roll-out, the central Salesforce team has developed a managed package (*unicorn*), which includes core UNHCR functionality and features. This package is based on Salesforce service cloud, and the NPSP (Salesforce's non-profit success pack). The unicorn managed package has been developed over the past three years, with a focus on supporting private sector fundraising and supporter management. The unicorn package has been deployed in multiple instances in local fundraising markets, as well as in the two central orgs. Multiple roll-out projects continue, both with individual markets, as well as new initiatives at central UNHCR organizational level.

## 1.2   Background Donor Relationship Management

Explanation of each Salesforce related activities follows.

- **unicorn.package:** [product] a solution package made for UNHCR and continuously developed with enhancements each year
  - The Salesforce unicorn package solution was initially developed for Private Sector Fundraising, enabling the management of both Individual Giving (IG) and Private Partnerships and Philanthropy (PPH) (major donor) fundraisers to allow to the management of relationships with prospects, donors, and partners, including account management, donation management, analysis and supporting global processes such as (due diligence, earmarking and reporting).
  - The unicorn package allows for markets to view and manage all their fundraising efforts from IG through middle donors to PPH. This unicorn package solution was designed to allow markets to install a centrally managed package locally, and benefit from its core functionality shared across each market.
  - The second generation of the UNHCR Salesforce implementation is to expand usage of the CRM across the organization to other non-PSP units to manage their relationship, engagement and pledging activities.

- **unicorn.synergy:** [instance] centrally managed Salesforce instance
  - A Salesforce instance with the unicorn.package, developed and maintained by the SF global team. Houses HQ teams who manage external relationships, across private sector, governments, and other external partners.

- **UNHCR Business Transformation Programme (BTP):** [integration]
  - Currently UNHCR is undergoing a rehaul of all business systems to upgrade them to latest generation applications and systems. As part of this, the unicorn.synergy instance will be integrated with the new systems (ERP, budget system) as the CRM for all engagement and relationship management with donors, partners and other stakeholders. It will be the source of all income data for UNHCR's finance system.

- **unicorn.global:** [instance] centrally managed Salesforce instance
  - The new global instance, based on the unicorn package and which will host small to medium sized Private Sector Fundraising markets, across individual giving and major partnerships. The migration project is currently under implementation.
  - Has integrations to Payment Service Providers, Email Marketing solution and CMS / Front End.

- **unicorn.'markets':** [multiple instances] individual, locally managed Salesforce instances
  - Some local Private Sector Fundraising offices (currently PSP Italy) as well as national fundraising partners (currently Germany, Sweden, UK and Switzerland) have implemented their own instance of the Salesforce unicorn package and developed their own localized solution on top.

- **PPH integration project** [integration]
  - This is a project, currently underway, that will extract specific PPH data from all local fundraising CRMs across the 50 local Private Sector Fundraising markets (some Salesforce, some non-Salesforce) via an ETL tool (extract, transform, load) to the main unicorn.synergy instance. This will collate all PPH data from markets globally, in order to provide an overview of the PPH landscape.

- **Local Salesforce markets** [multiple instances] individual, locally managed Salesforce instances not using the UNHCR managed package
  - Salesforce bespoke platform for an individual market (legacy system before unicorn package was developed): An individual Salesforce instance, implemented and maintained by a market. Likely that these will move to the unicorn platform in the future. Currently in place in Hong Kong, Netherlands, Mexico, Japan, Spain.

- **Old Global org**: [instance] centrally managed Salesforce instance
  - The old legacy Salesforce instance managing global donors and hosting specific markets. This will be migrated to unicorn.global or to their own unicorn instance in the future. The org will be phased out once the migration is complete.

See the table below for a summary overview of each of these programme elements. Please also refer to **Annex G: unicorn Admin Guide v3.1** to understand the background for the projects.

**Table 1: Overview of all Salesforce related activities at UNHCR**

| # | Activity | Description | Type of service |
|---|----------|-------------|-----------------|
| 1 | Unicorn package | A centrally developed managed package solution built on top of NPSP | HQ: Product development, release management |
| 2 | HQ org (Synergy) | Supporting various HQ functions including PSP HQ functions, GRF (Global Refugee Forum) | Unicorn-based. Primary instance for HQ teams who manage relationships with external partners |
| 3 | UNHCR Business Transformation | Project engagement to enable Salesforce inclusion and integration in the broader system and process renewal in the organisation | Engage and integrate Salesforce with systems across various functional areas in UNHCR, including new ERP, budgeting, and programme management systems |
| 4 | Global org (New) | Private sector fundraising (PSP) org, housing around 20 small to | Unicorn-based. Primary unicorn package instance for private sector fundraising |

| | | medium sized fundraising markets | |
|---|---|---|---|
| 5 | Unicorn markets | Individual PSP markets with their own Salesforce unicorn.package installed | Typically, larger markets which need their own separate instance due to volume or unique specificities |
| 6 | PPH data integration | Bidirectional data integration of HQ org from PSP Markets to create global overview of partnership activities | Data integration includes working with different database used in PSP Markets (Salesforce, unicorn Salesforce, non-Salesforce) |
| 7 | Salesforce bespoke markets | Other markets using Salesforce with older non-unicorn package instances, with or without NPSP | Continued support and implementation of enhancements to non-unicorn SF instances |
| 8 | Old Global org | Current legacy global non-unicorn, non-PSP instance | Will be decommissioned after migration to new Global is completed |

## 1.3    Statement of purpose & objectives

In the context of the above background information and current programme status, UNHCR are continuing with multiple roll-out projects, both with individual markets, as well as new initiatives at central UNHCR organizational level.

Some key aims for the programme over the next few years are:
- Include government donor relationship, contribution management and income recording functions into the HQ org;
- Enable Salesforce inclusion and integration in the broader system and process renewal across various functional areas in UNHCR, including new ERP, budgeting, and programme management systems;
- Finalise migration from the old global org to the new, unicorn-based global org for the remaining markets in the Private Sector Fundraising Service, and to shut down the old global org;
- Enable additional local implementations for larger, local markets;
- Support markets implementations, as well as user take-up, in key priority regions depending on the service provided (Europe, Americas, Asia, MENA, Africa)
- Continue to provide new updates and features through new releases of the unicorn package;
- Continue to support local market implementations to enhance local processes and workflows.

While we already have implementation partners in place who support our development and implementation work, the scale and complexity of the programme means that UNHCR is now seeking to select additional qualified Implementation Partners to further develop and maintain Salesforce solutions together. We are looking for experienced Salesforce implementation partners, with experience in working with NPSP, large-scale project or programme implementations, and with prior experience working with United Nations or International NGO implementations for fundraising purposes.

The service requirements are split into five different lots (parts) based on different areas of expertise:
- Lot 1: Project management and coordination services
- Lot 2: Business analysis and data migration work
- Lot 3: Support, adoption and training

- Lot 4: Release management and development
- Lot 5: Architecture and programme management expert services

Companies can submit a proposal to any of the five lots and to any of the regions within the lots separately. It is not mandatory to send an offer for all services or to all the regions within a lot. The evaluation of the different lots will be carried out separately on the technical and financial levels. Please make sure all the requirements per lot are included into your proposal. Please also clearly indicate the services/lots you are bidding for, to ease the evaluation process.

## 1.4 Joint venture, sub-contracting

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 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.

## 2 Requirements

As outlined above, the UNHCR Salesforce programme is combined of several, substantially different activities, and spans markets across the globe. Different parts of the programme are simultaneously in project phase and in post go-live phase. As such, this RFP is split into several different service lots, based on different areas we require support on. Implementing partners can choose which lots within the RFP to respond to, based on their expertise and experience.

The aim of the breakdown is to cover substantially different technical requirements and activity types, across the global implementation programme. The overall aim is to engage most relevant and experienced Salesforce implementation partner for each of the services required.

### 2.1    Overall Requirements applicable to all service lots

- Experience in Salesforce implementation work, ideally with experience in using NPSP, large-scale project or programme implementations, and ideally with prior experience working with United Nations or International NGO implementations for fundraising purposes.
- Assign consultants experienced in non-profit and/ or International Organisations
- Assign consultants with ability to lead any projects based on strong project management frameworks
- Provide thorough documentation around design and configuration rationale where relevant
- Adhere to best practice in designing and implementing solutions
- Manage on boarding of project members
- Travel for face-to-face meeting purposes when desired, depending on the location of project stakeholders (e.g. in Americas, Asia, Europe, Africa or MENA (Middle East and Northern Africa) regions)

### 2.2    Lot 1: Project management and coordination services

Working closely with the HQ CRM team at UNHCR, as well as local markets in active implementation of CRM projects, the partner will:
- Deliver project readiness and preparation work with local markets: define the project scope, goals, and deliverables of implementation projects.
- Support in the project implementation ensuring that CRM and technical solutions are effectively delivered on time and on budget
- Manage multiple partner implementation projects while providing both high-level and detailed business process consulting
- Develop and maintain overall project management documentation and tools
- Define clear roles and responsibilities throughout the project phases
- Define a clear roadmap for the whole project including data migration and the implementation of the CRM instance and related solution architecture
- Develop coherent overall timeline, budget and design solution plan
- Establish a pragmatic and straightforward risk management approach and log for the project
- Facilitate board meetings and provide exception handling and summary reporting through project
- Tight control of scope in the initial phase and the identification of future phases to deliver further capability
- UAT and Go-Live planning and monitoring
- Provide project management services for local Salesforce implementation projects

## 2.3   Lot 2: Business analysis and data migration work

Working closely with the HQ CRM team at UNHCR, as well as local markets in active implementation of CRM projects, the partner will:

- Support markets to elicit business requirements from stakeholders, using various techniques (interviews, observation, workshops)
- Deliver requirements mapping and functional design for adoption of, or migration to, Salesforce as a local CRM
- Capture and document business requirements in appropriate formats (e.g. business process mapping, ERD, requirements matrix)
- Undertake gap analysis against the existing features and functionality in the UNHCR managed package
- Support local markets and operations to migrate data from a current database to a new Salesforce environment:
- Develop detailed data migration plans, including preparation, testing and execution of the plan
- Provide data analysis to identify data to migrate, enable data preparation, including cleansing and deduplication as required.
- Undertake data mapping between the source and target systems
- Propose and set up tooling to facilitate data migration (when needed), including relevant ETL tools
- Enable markets to do quality assurance and testing, ensuring all data is transferred correctly and without errors

## 2.4   Lot 3: Support, adoption and training

- Working closely with the HQ CRM team at UNHCR, as well as local markets in active implementation of CRM projects, the partner will deliver effective training, capacity building and user engagement activities based on expertise and past experiences in this area
- Recommend, and if necessary, configure, existing functionalities Salesforce already offers for user enablement
- Design and deliver strategic change management plans and activities with new and existing markets and users – this may include content creation in different media formats (non-email based such as movies, prints), UNHCR user community engagement activities
- Produce documentations necessary for functional guides
- Work with HQ and regional teams to strategise rollout and ongoing adoption communications for small (10+) and large (100+) user groups
- Provide continuous BAU (business as usual) support services to live markets for both technical and business functional needs
- Drive continued onboarding of new teams (users) to Salesforce, including government donor relationship, private sector, and other organizational units;
- Manage continued onboarding of new teams to unicorn.global, including migrating remaining teams from old global instance, and onboarding of new markets.

## 2.5   Lot 4: Release management, development and testing

Working closely with the HQ CRM team at UNHCR, as well as local markets in active implementation of CRM projects, the partner will:

- Deliver end-to-end product development, release management and Application Lifecycle Management for UNHCR's Salesforce Org's;

- Ensure local Salesforce implementations follow HQ best practices and are in line with the vision and design of its managed package.
- Support the HQ Salesforce team to align with unicorn markets to maximise the benefits of standardisation and central investment in future development.
- Support the continued operation and enhancement of these platforms and ensure Lifecycle Application Management.
- Provide testing services for new implementations or package releases across the programme, including the different testing phases (functional, user acceptance, regression).
- Provide thorough documentation around design and configuration rationale where relevant, including through documentation of any local changes or customizations made in specific Salesforce instance

## *2.6   Lot 5: Architecture and programme management expert services*

Working closely with the HQ CRM team at UNHCR, as well as local markets in active implementation of CRM projects, the partner will:
- Act as key focal point and central repository of knowledge and expertise for the UNCHR Salesforce programme, to:
  - Assess and recommend best overall enterprise architecture and solution design covering all the functional areas, ensuring alignment between overall architecture and key business goals.
  - Provide strategic recommendations on infrastructure options, undertake revision and validation of the effectiveness of the technical architecture and solution proposed/ developed by implementing partners.
  - Provide expert advice on overall solution and enterprise architecture based on profound knowledge in non-profit activities in particular fundraising, partnership, and programme management;
  - Provide technical assurance to the business owners in UNHCR, and technical challenge and oversight to implementing partners.
  - Provide implementing agencies with technical insights and recommendations in the different areas of the implementation, taking account of the entire ecosystem context.
- Provide programme management and oversight services, enabling the successful delivery of UNHCR Salesforce programme:
  - Support the HQ Salesforce team on ensuring scalability of the programme from technical and resource points of view;
  - Make recommendations and give guidance on overall data strategy for Salesforce and related tools;
  - Work with other digital tool owners at HQ to align work streams.
- Provide insight and advice with regards to managing the HQ UNHCR Salesforce orgs:
  - For unicorn.global, outline key aspects of developing and supporting multi-tenancy global fundraising database, which is simulating financial database from where basis of quarterly financial reporting to HQ is generated;
  - For Synergy, outline key areas of concern when maintaining and further developing a multi-tenancy central relationship management database, also used for income recording, and with integrations to other core systems in UNHCR.
- Oversee delivery of integration with different data sources and end points by using best integration method, and automate processes where desired, including:
  - Project engagement to enable Salesforce inclusion and integration in the broader system and process renewal in the organisation, working with HQ Salesforce team to engage and integrate Salesforce with systems across

various functional areas in UNHCR, including new ERP, budgeting, and programme management systems;
- o Working with the HQ Salesforce team on the roll-out of the PPH integration project;
- o Advise on the design of off-platform processing, archiving as well as data management in conjunction with Salesforce and other technology such as data warehouse and ETL.

## *2.7  Customer responsibilities*

**UNHCR will provide the following**
- ● Providing Salesforce org for development and management of solution package
- ● Timely feedback on concepts and all stages of development
- ● Dedicated staff working on the project
- ● Clarification of requirements and user acceptance criteria
- ● Availability for work sessions, brainstorming and consultation throughout the project
- ● Subject matter experts
- ● Steering group oversight
- ● Business analyst(s) for documenting user stories
- ● User acceptance test facilitator
- ● Project manager to manage UNHCR side
- ● Country resources in case of local implementation
- ● Travel expenses (including flight ticket, UN daily subsistence allowance, terminal expenses) incurred by the Contractor's personnel shall be reimbursed by UNHCR in the amount of the actual expenses incurred by the Contractor's personnel as evidenced by original supporting document, provided however that UNHCR shall not be liable to reimburse travel expenses incurred more than the amount indicated in the relevant purchase order. The maximum amount permitted for travel in any purchase order shall be based on the cheapest economic airfare available as determined by the UNHCR Travel Unit, in compliance with UNHCR travel policies.

## *2.8  Performance evaluation*

UNHCR expects to monitor the performance of the selected supplier under the following deliverables.

- • Effective completion of the different phases as per pre-agreed deliverables and timeline based on different projects as assigned.

# 3 Content of the proposals

## 3.1 Technical proposal (Annex B)

**IMPORTANT**: No pricing information should be included in the Technical Offer. Failure to comply may risk disqualification. The technical offer should contain all information required to assess the ability of the vendor in providing the relevant services.

As outlined above, the UNHCR Salesforce programme is combined of several, substantially different activities, and spans markets across the globe. As such, this RFP is split into five different lots, based on different areas of expertise. This to cover substantially different technical requirements activity types which are relevant across the UNHCR CRM programme. The overall aim is to engage most relevant and experienced Salesforce implementation partner for each of the services required. As such, prospective partners are invited to submit a technical and financial proposal, for each of the lots that they believe they are best placed to deliver.

Study the requirements outlined, which outline the possible complexity delivering the activities within each services lot of this RFP and take this into account in your proposal.

Each technical proposal should be submitted using the template included in **Annex B**, or if you see fit, use of slide deck such as Power Point or Google Slides instead of this reply form are allowed. Information should be concisely presented, and must include and address the following areas, in this order:

**Company Qualifications**
During the technical evaluation, in this section, the panel will score your company`s relevant experience in the Salesforce and CRM implementation sector, related to NPSP, fundraising, or non-profit implementations in terms of years and number of clients:
- Please confirm year the company was founded
- Please list your company office locations
- Please let us know the total number and list of clients you have (current and previous
- in total)
- Please summarise any service provision experience you have in the non-profit sector
- Please let us know the total number of relevant, similar projects successfully completed and/or currently underway
- Please provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.

**Account management**
Account management is crucial for running a successful program. This section is dedicated to measure the proposed customer service towards UNHCR. During the technical evaluation, in this section, the panel will score the experience of the core people who will work on UNHCR projects (based on the number of years and demonstration expertise in the area):

- Please provide information of core staff who will be working on the account, a short CV of max one page will be sufficient to outline the working experience and qualifications of the core staff. Please make sure you elaborate on this section properly, to understand the level of support proposed for managing our account.

**Proposed Services**
During the technical evaluation, in this section, the panel will score (1) the comprehensiveness of the proposal, and (2) your company`s compliance regarding the required services listed under Section 2 of this ToR (as per relevant lot(s)that you are submitting a proposal for).

As these lots are not yet related to a specific project, for which UNHCR can provide detailed requirements, please outline in this section a proposed general approach to the work included in the relevant lot(s) your company are submitting a proposal for. This should include proposed ways of working, project milestones, general challenges (based on your company's relevant experience) and ways to mitigate them.

### *3.2    Financial offer (Annex C)*

Companies are invited to submit ***one financial offer proposal per relevant service lot*** which they are interested in bidding for. Please use the provided template in Annex C to propose your fee structure for the duration of the contract. No other format will be accepted.

### *3.3    General Conditions of Contracts (Annex D)*

Please indicate your acknowledgement of the UNHCR General Conditions of Contract for the Provision of Services (Annex D).

### *3.4    Special Data Protection Conditions (Annex E)*

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

### *3.5    Vendor Registration Form (Annex F)*

If your company is not already registered with UNHCR, please complete, sign, and submit with your Technical Proposal the Vendor Registration Form (Annex F).

## 4 Evaluation and selection

### 4.1 Technical evaluation

Only bids compliant with the relevant pre-selection criteria (listed per each lot below) will be considered for the full evaluation. The technical offers for all the five lots 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 the detailed scoring breakdown below. As confirmed, the evaluation of the different service lots will be handled separately.

- Company Qualifications for ALL LOTS (max 10 points)
- Account Management for ALL LOTS (max 10 points)
- Specific requirements per lot, as listed in section 4.2 to 4.6 below (max 50 points)
- In total: max 70 points

**The minimum passing scores 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.

The format and sequence of your technical offer should follow the following order and each section to have corresponding title from the evaluation criteria below (e.g. "[1] Number of clients"). Please use the template technical proposal form in **Annex B**, or if you see fit, use of slide deck such as Power Point or Google Slides instead of this reply form are allowed as long as the header of each slide clearly states which evaluation point you are addressing.

### 4.1.1 General evaluation criteria (ALL LOTS)

| **Company Qualifications** for ALL LOTS (max 10 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [1] Number of clients (3 points) | Please send list of clients; the scores will be allocated based on number of clients (previous and current in total) in both sectors (charity and private). |
| [2] Service provision experience in the non-profit sector (3 points) | The scores will be allocated for the number of years in the non-profit sector (i.e., charity), based on the evidence provided. |
| [3] Number of similar projects (4 points) | The scores will be allocated for number of similar projects successfully completed and/or underway. |
| *Please send list of clients and provide three references (reference letter, email address, contact person, phone number) from your current/previous clients to be contacted in case of selection.* | |

| **Account Management** for ALL LOTS (max 10 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [4] Experience of core people who will be assigned to 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. Please list the number and type of consultant proposed for the project. |

### 4.1.2 Lot 1 specific criteria

Only companies which are compliant with BOTH of the below pre-selection criteria will be considered for the full evaluation process for Lot 1.

| Pre-selection criteria | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| Proven experience in project management of Salesforce CRM implementations **AND** Company has relevant staff, who would be assigned to work on the projects present locally in one or more of UNHCR priority regions for this area (Americas, Asia, MENA, Africa) | Please list the number of projects and clients on your technical proposal first page to ease the assessment. Please list office locations of your company, on your technical proposal first page to ease the assessment. |

| Proposed Services for Lot 1: Project management and coordination services (max 50 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [5] Proposal for services in project management and coordination | A detailed section explaining your proposed approach to supporting UNHCR on project management and coordination services, as included in Lot 1 (section 2.2 of this ToR). Address what your proposed approach would for projects which are either: <br>• Salesforce implementation for markets having a local Salesforce org, using the UNHCR managed package (unicorn) <br>• Implementation of markets onto the global multi-tenant org, including developing localization for markets as required <br><br>Include for each project case: <br>• Project milestones and rationale <br>• Address the challenges you expect to see and considerations you would raise |

### 4.1.3 Lot 2 specific criteria

Only companies which are compliant with ONE of the below pre-selection criteria will be considered for the full evaluation process for Lot 2.

| Pre-selection criteria | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| Proven experience in implementing a Salesforce solution for Fundraising **OR** Proven experience in migrating from a legacy or outsourced database, into a new or existing Salesforce instance. | Please list the number of projects and clients on your technical proposal first page to ease the assessment. |

| Proposed Services for Lot 2: Business analysis and data migration work (max 50 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [5] Proposal for services in business analysis and data migration | A detailed section explaining your proposed approach to supporting UNHCR on business analysis and data migration work as included in Lot 2 (section 2.3 of this ToR).<br><br>In your proposal, outline your approach to business analysis and data migration in the specific context of UNHCR Salesforce implementations, including:<br>• How you would gather requirements for adoption of, or migration to, Salesforce as CRM, including:<br>    o What elicitation methods would you employ to gather business requirements?<br>    o How would you capture and document business processes and requirements?<br>• How you would support local markets and operations to migrate data from a current database to a new Salesforce environment, including:<br>    o How would you develop data migration plans for preparation, testing and execution?<br>    o What tools would you propose to facilitate data migration? |

*4.1.4   Lot 3 specific criteria*

Only companies which are compliant with BOTH of the below pre-selection criteria will be considered for the full evaluation process for Lot 3.

| Pre-selection criteria | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| Proven experience in providing training, capacity building and user engagement activities for Salesforce user groups **AND** Company has relevant staff, who would be assigned to work on the projects, present locally in one or more of UNHCR priority regions for this area (Americas, Asia, MENA, Africa) | Please list the number of projects and clients on your technical proposal first page to ease the assessment.<br><br>Please list office locations of your company, on your technical proposal first page to ease the assessment. |

| Proposed Services for Lot 3: Support, adoption and training (max 50 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [5] Proposal for services in support, adoption, and training | A detailed section explaining your proposed approach to supporting UNHCR on support, adoption and training as included in Lot 3 (section 2.4 of this ToR). |

| | Please cover in your proposal how you would propose to structure and implement the following, within the specific UNHCR context:<br>• How you would work with HQ and regional teams to deliver rollout and ongoing adoption communications for small (10+) and large (100+) user groups<br>• How you would propose to drive continued onboarding of new users to Salesforce, including government donor relationship, private sector, and other organizational units;<br>• Your proposed approach to training, capacity building and user engagement activities<br>• Your recommendation for usage of existing functionalities Salesforce offers for user enablement |
|---|---|

### 4.1.5 Lot 4 specific criteria

Only companies which are compliant with BOTH of the below pre-selection criteria will be considered for the full evaluation process for Lot 4.

| Pre-selection criteria | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| Proven experience in implementing a Salesforce solution for Fundraising or specifically using NPSP<br>**AND**<br>Company has relevant staff, who would be assigned to work on the projects, present locally in one or more of UNHCR priority regions for this area (Americas, Asia, MENA, Africa) | Please list the number of projects and clients on your technical proposal first page to ease the assessment.<br><br>Please list office locations of your company, on your technical proposal first page to ease the assessment. |

| Proposed Services for Lot 4: Release management and development (max 50 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [5] Proposal for services in release management and development | A detailed section explaining your proposed approach to supporting UNHCR on release management and development as included in Lot 4 (section 2.5 of this ToR).<br><br>Include in your proposal and detailed outline of how you would provide the following, within the specific UNHCR context:<br>• End-to-end product development, release management and Application Lifecycle management for Salesforce instances for UNHCR; |

| | • Ensure market localizations which are implemented, are aligned with package vision and design<br>• Testing services for implementations or package releases across programme, including different testing phases (functional, user acceptance, regression). |
|---|---|

*4.1.6 Lot 5 specific criteria*

Only companies which are compliant with BOTH of the below pre-selection criteria will be considered for the full evaluation process for Lot 5.

| **Pre-selection criteria** | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| Proven experience in overseeing and implementing Salesforce solutions for fundraising purposes using NPSP **AND** Company has relevant staff, who would be assigned to work on the projects, present locally in Europe, to enable close working with the Europe based HQ team. | Please list the number of projects and clients on your technical proposal first page to ease the assessment.<br><br>Please list office locations of your company, on your technical proposal first page to ease the assessment. |

| Proposed Services for Lot 5: Architecture and programme management expert services (max 50 points) | Documents, information to be provided to establish compliance with the set criteria |
|---|---|
| [5] Proposal for services architecture and programme management expert services | A detailed section explaining your proposed approach to supporting UNHCR on architecture and programme management expert services, as included in Lot 5 (section 2.6 of this ToR).<br><br>• Act as key focal point and central repository of knowledge and expertise for the UNCHR Salesforce programme:<br>   o Provide strategic recommendations on infrastructure options, based on profound knowledge in non-profit activities.<br>   o Provide technical assurance to the business owners in UNHCR, and technical challenge and oversight to implementing partners.<br>• Provide programme management and oversight services, enabling the successful delivery of UNHCR Salesforce programme: |

| | |
|---|---|
| | <ul><li>o Support on ensuring scalability of the programme</li><li>o Make recommendations and give guidance on overall data strategy;</li><li>o Work with other digital tool owners at HQ to align work streams</li><li>• Provide insight and advice with regards to managing the HQ UNHCR Salesforce orgs and integrations where required</li><li>o Make recommendations for central Salesforce orgs (global and Synergy)</li><li>o Oversee delivery of integration with different data sources and end points by using best integration method, and automate processes where needed.</li></ul> |

## 4.2 Financial evaluation

The maximum number of points (30) will be allotted to the lowest price offer. All other price offers will receive points in inverse proportion to the lowest price; e.g., [total Price Component] x [US$ lowest] \ [US$ other] = points for other supplier's Price Component.

The offer reaching the highest combined scoring for each lot (technical & financial) will be selected for the lot.

## 4.3 Timeline of the project

- Opening of RFP: 14 March 2023
- Proposals due: 18 April 2023 (Close of Business)
- Agency appointed (estimated): 15 June 2023
- Project to kick off (estimated): 01 July 2023