Annex A: Terms of Reference

RFP/GRC/2024/003

Request for proposal for donor database system development and maintenance services for UNHCR Private Sector Partnerships in Greece

Contents

1 Introduction

1.1 Background

The Office of the United Nations High Commissioner for Refugees was established in 1950 by the United Nations General Assembly. The agency is mandated to lead and co-ordinate international action to protect refugees and resolve refugee problems worldwide. The United Nations Refugee Agency, based in Geneva, Switzerland, currently has 17,878 employees (about the seating capacity of Madison Square Garden) in 132 countries and supports refugees to get equal rights and safe lives. To support and protect refugees, one of the world's most vulnerable groups in so many places and types of environments, the UNHCR provides a variety of goods and services, such as temporary shelter, water, and food.

Private Sector Partnerships (PSP) service: UNHCR is almost entirely funded by voluntary contributions from governments and private donors.

UNHCR has an ambitious Private Sector Partnership (PSP) program which capitalizes donations from private-sector donors, through various channels including Face-to-Face, Direct Mailing, DRTV, Digital channels and Telemarketing. Fundraising in Greece mainly consists of Face-to-Face activities for acquisition purposes and Direct Mailing activities for existing donors' cultivation. As part of the international UNHCR PSP strategy, and to build a good relationship with new and existing donors, increase donors' retention and maximize contributions, PSP Greece is pushing a lot to increase its Telemarketing program.

1.2 Statement of Purpose & Objectives

To achieve cost efficiency whilst ensuring outstanding quality of service, UNHCR Private Sector Partnership (PSP) is seeking to enter into a Frame Agreement (FA) for donor database development and maintenance services with vendors specialized in such service area.

The Frame Agreement will be signed with one successful bidder for an initial period of thirty-six (36) months (Phase 1), with a possibility to extend the contract period to twenty-four (24) months upon satisfactory performance.

- Phase 1: starting date of the project 01 January 2025 to 31 December 2027 (36 months)
- Phase 2: 1 January 2028 to 31 December 2029 (24 months)

1.3 Pre-selection criteria

To be eligible to participate in this bidding, your company must be registered and based in Europe. To establish compliance with this criterion, please send with your technical response form (1) your company registration certificate and (2) the duly filled out, signed and stamped vendor registration form. Please also confirm the HQ of the proposed account management team (city & country).

Failure to comply with this pre-selection requirement will result in disqualification.

2 Database Management System (DBMS) requirements

Bidders are requested to prepare their technical proposal (Annex B) based on the requirements listed below and quote for the services separately on the financial offer form. The amount of data processed by the donor DB during the contract period may change in the future due to changes in the number of donors and changes in the long-term plan of the UNHCR private sector partnership team.

The evaluation will be done separately on technical and financial levels. Please refer to the evaluation criteria below for more information.

The contractor will need to deliver the Services as per following:

2.1   Functional Business Requirements I (Payment management)

- Management of recurring payments and one-off payments flows through web service integration with the credit cards service provider.
- Management of the recurring payments processes associated to direct debit mandates on IBAN, in the framework of SEPA Core Direct Debit ISO 20022 XML standards.
- Management of the recurring and one-time payments process associated with various payment methods like Apple pay, Google pay, Stripe, Paypal, Worldpay
- Ability to import and export files related to list of mandates, compliant with SEPA Core Direct Debit ISO 20022 XML standards.
- Ability to Import and export files compliant with BOG (Bank of Greece) and European Central Bank (ECB) rules and directions.
- Ease of use for importing and exporting files and documents related to donation management (donor registration, donation record input, etc.)
- Integration with Payments Management systems: creation of flows (list of mandates) based on the information of the mandates and previous outcomes, storage and access to the historical outcomes provided by the bank system and the credit cards service provider.
- Selection and Filtering based on recurring mandates information and historical outcomes related to payment and alignment requests provided by the bank system and the credit cards service provider.
- Management of Refunds of payments
- Management of the alignment requests processes associated to direct debit mandates on IBAN, in the Greek framework of DIAS Direct Debit ISO 20022 XML standards.
- Availability to manage SEPA direct debit process through web service integration.
- Availability to manage Web/Mobile & F2F donors/donations through service integration.

2.2   Functional Business Requirements II (CRM features and functionalities)

2.2.1   Data recording and editing

- Record and manage of one-to-one donors' interactions with the F2F, the digital platform and the call centers applications.
- Tracking complex marketing campaigns outcomes over multiple networks and channels
- Tracking detailed donors' information, claims, actions, consents and motivations
- Management of the donors' information change, communication record including refund request and process

- Historical tracking of all users' data editing operations
- Reading and writing records on native tables of contacts, gifts, regular pledge, actions, campaigns and others according to different user grants
- Management of the Site code (campaign, earmarking)
- Ability to import of postal giros donations in Hellenic Post money transfer system format
- Ability to import of bank transfers donations in a custom format
- Entering of data by manual one-to-one loading
- Entering of data by massive import of external files of records of fixed paths through semiautomatic loading interface (e.g. F2F batch, call center)
- Entering of data by automated scheduled procedures integrated with other supplier and platforms and real time integration services (such as integration with credit card service provider, marketing platform, lead generation, BI tool)
- Merging of records
- Ability to auto-detect the duplicate donor information and provide deduplication function when new donor registration.
- Ability to auto-detect and auto-prevent the duplicate file attachment upload
- Automation process using grouping function (by campaign, by funding detail)
- Ability to provide statistical data based on donation records for KPI management and donor segmentation (Yearly/Periodic donation amount etc.)
- Process and data management on donation cancelation
- Availability to record and manage one-to-one donors' interactions created by the Web/Mobile F2F Application

2.2.2   Data Validation

- Standardization of donor data (personal data, address detail, phones etc.) according to Greek & Cypriot format standards and grammatical specifications
- Data integrity batch procedures and real time controls of the web interface of contact information (postal and email address, phone, mobile), fiscal code, etc..
- Data integrity batch procedures and real time controls based on complex algorithms to validate bank details (IBAN for GR & CY and credit card number)
- Warning system: ability to insert alert on donor page highlighting fields to be verified (Date format, account/credit card validity check, blocking rules etc.)

2.2.3   Donor Profiling and indicators

- Donor page should include synthetic indicators as well as donor's information (application info, donation period, the number of donations, accumulated gift amount, upgrade amount, acquisition channel, first pledge amount, first pay month, last pay month, event/project participation, tags, new field generation)
- Donor segmentation (Individual, Middle/Major Donors, SMEs, Corporation, Foundation, etc.) and management function (opportunities, activities/steps, segmentation, warnings, visualization)
- Donor grouping, link and management function (retrieve/add/edit/download/report creation)

2.2.4   Configuring tasks on a specific donor or groups

- Ability to make a donor group upon user's needs and manage it through the system (group name, date, and detail)
- Assign tasks to users and provide due dates and reminders to keep one to one donor relationship management on track. Tasks must be accessible by each DB user and shared between users

2.2.5   Manage Campaign/earmark cycle

- Ability to create a campaign and proceed to campaign on the system
- Ability to manage donor group by campaign, earmarking, year, campaigner, TV channel, acquisition route in detail
- Develop triggered actions and follow-up campaign processes (payment processing based on campaign) using easy workflow tools and track and report success
- Donation fund(earmarking) creation and management function

2.2.6   Interface Integration

- Possibility of API integration with UNHCR's donation web page for data integration (donor registration, payments, donor information, and information change)
- Possibility of building system integration functions with new payment systems
- Establishment of integration Function with Call Center System (incl. call records &recording file management, and auto file storage)
- Establishment of integration Function with F2F Acquisition System (incl. signups records, locations, frontliners info)
- Establishment of integration Function with UNHCR's donation web page for data integration (donor registration, payments, donor information, and information change)
- Establishment of integration function with SDD processing system
- Establishment of API integration with the credit cards service provider
- Establishment of API integration with e-mail Marketing System (incl. email automation and data management via donor DB system)
- Possibility of API integration with SDD processing system
- Possibility of providing APIs for interface connection when adding a new system (propose a plan to ensure flexibility/scalability of the system)

2.2.7   Data selection tool & Querying functionalities

- The data selector tool should be simple and easy for all users to interrogate the system (top-down process, set logic, and advanced filters). The selection must be allowed on all field available
- To select groups of different units using both logical operator (AND, OR, NOT) and SQL functions -for analyst users
- To select records randomly (A/B Testing)
- Editing and manipulating selected data with massive update procedures
- Downloading selected data according to 1) predefined record layouts, and 2) rough formats

- Saving autonomously customized queries
- Producing basic summary statistics on selected data
- Regular pledges search and filtering through the presence/absence parameter of attached documents

2.2.8   Archiving documents

- Ability to upload various formats of the document (pdf, jpg, jpeg, html, doc format, etc.) such as campaign material, donation receipts, voice recordings.
- Automatic functions for uploading sets of documents by the external field ID and the file name values matching
- Keyword search of documents and inside document (tagging)
- Email sent, records of telephone conversations and F2F comments can be attached to donors' touchpoint history

2.2.9   Functionalities for Marketing Activity

- Delinquent donations management (SMS, e-mail), including communication automation
- Cancellation donor management, including communication automation (SMS, e-mail)
- Marketing activity and auto communication creation utilizing email, SMS, SNS (New donor, Cancellation donor, Upgrade/Reactivation donor, Lead, one-off donor, etc.)
- Differentiated auto-communication program by donor segment (communication channel, frequency could be decided differently by donor segment)

2.2.10   Cost Tracking

- Recording expenses against each campaign's segment
- Recording unit costs of each historical interaction with the donor, to be able to evaluate the net Lifetime value in the donor page

2.2.11   Other Functionalities

- Production of single annual tax certifications and donation receipt in pdf format through a specific function. Pdf document processing and production for mass mailing, web print out, or on request
- Sending annual tax certifications by e-mail
- End users can extend the details captured to include any new information without software development
- Composition, recording and export of the codeline essential for postal payment slips (giros)
- Independent management of the supporting tables (e.g. saving own table format, glossary)

2.3   Functional Business Requirements III (Analysis/Reporting functionalities)

- Analysis report utilizing donor, campaign channel, donation amount

- Fundraising performance analysis (by campaign, channel, period, fundraiser, region, fundraising place, etc.)
- Lifetime value analysis through total donation period, gift amount, gift frequency, net contribution, gross contribution
- Attrition/Retention report (the amount of donor/pledge by channel/earmarking/acquisition year/fundraiser/fundraising place/region/age/donor seg/specific donor group)
- Donor tracking analysis (for new/cancellation/reactivation/RG conversion/upgrade/downgrade/RG add)
- Delinquent status analysis (delinquent months, payment failure reason, occurrence period)
- Cancellation status analysis (month, channel, cancellation reason, cancellation donor profile)
- Data extract support for LTV data refresh or related big data refresh
- Monthly reports for results (actual vs plan) in accordance to UNHCR internal standards and requirements (MSRP / Budget Site cost table)
- Based on agreed variables, the templates should have both ranking and filtering system and must allow expanding, collapsing, hiding or displaying different levels of detail.
- Each template must be downloadable (in .pdf, .xls or .csv file).
- The templates should be available through a web-based interface or dedicated modules
- Earmarking table in accordance with UNHCR internal standards and requirements – More information will be provided upon request

2.4   DBMS Technical Requirement

2.4.1   Information Security

- The access to the application is through a secure link and require password authentication (2-step)
- The application has mechanisms to resist to usual attacks such as DoS, flooding and should provide resiliency
- Downloading data (excel, text file, etc.) must be encrypted when transmitting and receiving personal information between the web server and the user

2.4.2   Privacy

- Donor's personal information should be restricted from access by users (limit data search/extraction, limit access authorization, provide data inquiry records, etc.)
- Certificates certifying compliance with PCI DSS data security regulations (Credit Card Industry Information Security Standard Rules) must be available (submit AOC or SAQ)

2.4.3   Authentication and Authorization

- The interface of the database management system is accessible only by authorized users 24/7, except for planned downtime and scheduled maintenance timings
- The interface of the database management system is accessible through web-based application or cloud interface, working on common internet browsers (Internet Explorer, Mozilla Firefox, Google Chrome, Safari, Opera)

- The application and the material functionalities shall be accessible by UNHCR no less than 87.5% of the time 24 hours a day, seven days per week, including holidays.
- The interface of the database management system is optimized to be used simultaneously by at least 40 concurrent users with different profiles and data editing, uploading, and downloading capabilities

2.4.4 Accessibility Control

- External leakage prevention/detection systems must be established, or blocking/detection function must be provided
- Submit a policy report of the system (at least once a year)
- Emergency security measures occur, it must be immediately applied to the system

2.4.5 Audit Trail

- Save donor DB system access records for at least 6 months (access log, security item inquiry, program execution, encryption history, change of user setting per user)
- Save donation receipt issuance records
- System access logs must be provided as an integrated log analysis system

2.4.6 Internal Controls

- DB administrator able to create and edit user account and users profiles
- Different profiles of users able to access to heterogeneous levels of information and functionalities of the system, according to the users' responsibility

2.4.7 Productivity

- Provides drag-and-drop box functionality to data fields selection for ease of system screen configuration upon user's needs
- Copy/paste between data tables should be possible (or be able to provide the same functionality) to facilitate user data management and extraction

2.4.8 Performance

- Response time upon users' request (except for big data retrieval) should be in 3 Seconds (Single task 1 second, Each 1,000 line 3 seconds)
- Data analyst users must have access to the raw data/metadata of the system (in various formats excel, txt, csv, ppt));both with internal and external provider solutions
- The access to the origin data set and metadata is guaranteed in reading mode, in compliance with security standards without affecting the original data and the response time in the database's interface.
- The availability to manage other non-mentioned measures that enhance the self-reliance on data structures and metadata manipulation will be considered an asset.

- Changes in origin data structures and metadata have to be notified whenever they occur. The map of the relational and hierarchical structures must be accessible upon request and its updates must be notified whenever they occur.
- Data can be accessed at predetermined times (weekly or monthly), upon request or when certain events occur

2.4.9   Interoperability

- Proven ability to manage data integration solutions with third suppliers using web services, API, ARS
- Expertise level to manage data integration solutions with third supplier using web service, API and other industry-standard interfaces
- Data integration on various form of application file imported through online and offline
- Availability of a file manager directory for the exchange of files to / from the application accessible through both an SFTP or an encrypted FTP connection and the web interface;
- Availability to create new directories to exchange files, each along with a dedicated address and login so that they can be accessible by third parties through a secure interface
- Real time data export with customized layout
- Automatic function for downloading all/selected data based on acknowledged data format
- Scheduled data export of rough data of the whole data set upon request
- Web service integration to exchange data with other external suppliers
- Ability to send email (incl. thank you letter, newsletter) and SMS in bulk
- Ability to import contacts list (e-mail address, mobile phone number) using excel, txt etc.
- Ability to print out mailing label, donation certificate, donation receipt from DB
- The system provides an optimal viewing and interaction experience for online donation pages, easy reading and navigation with a minimum of resizing, panning, and scrolling, across a wide range of devices (desktop & mobile)
- Bidirectional integration between the application and business intelligence tool
- The solutions should install 'out of box' with very little (if any) customization required during the implementation and development project

2.4.10   Data Quality

- The DBMS interface must provide dedicated tools to standardize donors' personal data and address detail
- The DBMS interface must provide dedicated data integrity batch procedures and real time controls of the marketing platform for donor information/events
- Data integrity batch procedures and real time controls based on complex algorithms to validate bank details (IBAN and credit card number)

2.4.11   Data Standards

- In the event of an addition or change of data structure from a user's point of view, it should be able to provide an explanation and guidance of data structure and algorithms.

- Data structure and algorithm for interworking with UNHCR data warehouse must be delivered upon request

2.4.12   Data Migration

- Provide data migration services to ensure legacy data be stored accurately in the new system (incl. data migration costs on the estimate)
- Proof of experience in data migration to ensure legacy data be stored accurately in a new Salesforce system

2.4.13   Serviceability

- The system is flexible enough to allow significant future extensions of its capabilities(Possibilities on the development of new function)
- "The system can be expanded on the basis of the possible functional needs identifiable in the future
  a. Users: Easily using the software for an increasing number of users
  b. Data: maintaining performance and usability regardless of the expansion of data handled and stored
  c. External data sourced: capability to receive and manage a load of data from external provides and data source systems
  d. Functional: adding new functionality at minimal effort
- Software licensing available
- The software versioning should constantly be kept updated to the most reliable version. An upgrade of the system must not result in a system outage

2.4.14   Training & Documentation

- Provide the training including materials and system documentations when launched or newly added in the system) in English
- Expert users (analyst and programmers) must be trained with all the necessary skills and knowledge in building and saving queries in English

2.4.15   Maintainability

- If a technical problem with the system is identified, it must be possible to solve the problem within a certain period (provide details on system quality assurance)
- The supplier should daily backup all data, and be able to restore data backup to maximum 6 months.
- Extraordinary maintenance and interruptions of the system must be notified by the supplier at least 48 hours before
- A UAT environment needs to be put in place to allow testing of functionality before deployment to Production

- If upload procedures fail for one user, the system should be able to recover and continue uploading the other data for other users
- The supplier should be able to complete the analysis and recommend the best hosting solution
- The proposed system should have a detailed policy for coping with the system error
- The proposed system should have a detailed policy for coping with extremes of traffic flow
- The supplier is able to provide a Disaster recovery plan
- The supplier is able to provide a Backup plan in line with requirements
- The functional requirements specified in the contract must be completed within three months after signing the contract including system implementation and test

2.4.16 International Deployment

- The system has the possibility to be converted into an international version (English)
- The system has the possibility to be converted into a specific customizations for other countries (local languages).

2.5 DBMS Development, Maintenance, and Customer Support SLAs

2.5.1 DBMS Development and Data Migration

The development phase of DBMS, inclusive of the initial development and configuration of the interface and the data migration, should last no longer than three months from the moment when the supplier accepts and confirms their availability in providing the services.

During this period the supplier should provide UNHCR with a full training to users and assistance and for the data migration, the implementation, and the testing of the required functionalities of the interface described above (See Section 2).

2.5.2 Service–Level Agreements regarding Maintenance and Customer Support

The solution must include service-level agreements (SLAs) regarding ongoing maintenance and support.

- Grading of issues into different levels (minor, major & critical)
- Response times and resources applied to each issue level
- Process for identifying and resolving bugs and errors
- Penalties for failing to meet SLA response times

3 Innovation Section

This special section is dedicated to the innovative suggestions presented by the supplier as new approaches, activity follow-up, and tests for standard and emergencies activities.

4 Emergency Preparedness Plan

In case a humanitarian emergency occurs involving UNHCR, an emergency alert will be formally communicated to the supplier focal point by phone or email.

- Timing for giving support or directly managing the set-up of extraordinary payment management procedures, such as Credit Card
- Technical capacity and management to export a massive volume of gifts/new donors when emergency request
- Supporting for the set up ad hoc export files and templates for specific reporting purposes
- Technical capacity and timing to set up extraordinary integration systems with third suppliers and external platforms

5   UNHCR Donor DB Scenario

The database supplier goal is to construct and develop the most effective database possible, by customizing as much as possible the database interface to achieve the greatest possible impact for a given fundraising budget.

The Scenario of this document must be used as a reference. UNHCR can adjust the figures provided hereinafter depending on the changes of planning or strategic direction.

The main DATA SET are listed in the below table. (Numbers are estimates for the end of 2024)

Tables	Records	Unit type	Main attributes
Contacts	120,000 (20K-Active RG donors)	Donor and UNHCR Supporter (Individual, Group, Foreigner)	Name, Gender, Birth date, submit date, Acquisition channel, Entered by
Payment Transactions	2,000,000 (Approximately 250k/yearly)	All of payment transactions (Recurring, One-off), RG transactions should be aligned with the pledge in pledge table	Support no, Income date, Send date, Campaign, Donation, Payment method, Entered by
Pledges (incl. one-off pledges)	537,000 (New pledges 150k/yearly)	Mostly regular pledges of SDD, Credit card. However, there are other payment methods and one-off pledges are on the table	Support no, Order date, Pledge date, Gift Amount, Payment method, Account no/Card number, Expiration date, SDD/Credit card approval status, Entered by
Donor communications	3,000,000 (1.4m/yearly)	Donor communication records (inbound/outbound call, mail, email sending, etc.)	Support no, Date, Type, Type in detail, Title, Contents, Entered by
Change history	1,000,000 (300k/yearly)	Data change history in the DB (IBAN, address, regular amount, etc.)	Support no, Date, Title, Change before, change after, Entered by
Tax certifications	110,000 (330k/yearly)	Documentation on the Issuance of tax certificate	Support no, Receipt no, Issuance type, Period, Date, Simple process type, Printing #

The main activities are the following (frequency can vary according to operational needs).

Activities	Frequency	Managed by
Request for recurring/one-off payment of SDD IBAN	2times/month	UNHCR
Request for recurring/one-off payment of Credit card	2times/month	UNHCR
Request for documents upload	daily	Supplier
Instant/early withdrawal for the first recurring payment (IBAN, Credit card)	daily	UNHCR

Create manual payment transactions of wire transfer, Giro payment	1~5times/month	UNHCR
Donor information editing/adding donor communication records	daily	UNHCR
Create/edit/delete pledges upon donor request	daily	UNHCR
Export the results of attrition report	1~2times/month	UNHCR
Export the results of additional data analysis	1~2times/month	UNHCR
Data integration and archive with the Call Center	daily	UNHCR
Data integration and archive with the F2F Agency	daily	UNHCR
Data integration and archive with the Digital Donation page	daily	Supplier
Data integration and archive with the Digital Marketing platform	daily	Supplier
Data integration and archive with the UNHCR Data Warehouse	3-4times/month	Supplier
Technical support with the user training and remote support	8hours/month	Supplier
Technical support for the development of DBMS functionalities	16hours/month	Supplier
Technical support for the correction of the system error	16hours/month	Supplier

The fee structure breakdown and forecasted volumes for donor DB system operation in UNHCR are as below.

	2025	2026	2027	2028	2029
Number of donors & users					
Total donor	132,000	145,000	151,000	156,000	163,000
RG donor	67,000	74,000	81,000	90,000	99,000
IBAN RG donor	25,000	29,000	33,000	37,000	42,000
Credit card RG donor	41,000	44,000	47,000	52,000	56,000
Donor DB user	20	22	23	27	30
Donor communications					
SMS via. marketing solution	103,000	120,000	136,000	157,000	181,000
emailing via. marketing solution	1,348,000	1,491,000	1,659,000	1,847,000	2,051,000

6   Content of the Technical Offer

Please fill out **Annex B (Technical Offer Form)** as your technical offer. Please feel free to add any supporting documents.

Important: No pricing information should be included in the technical offer. Failure to comply may risk disqualification.

You need to provide information regarding the following aspects:
- **Company profile and account management**
  - o Established year
  - o Clients (non-for-profit sector) from the past 5 years (current and former clients in total)
  - o Clients (private sector) from the past 5 years (current and former clients in total)
  - o Account management, the following technical experts are required:
    - ✓ Account Manager: The liaison between the company and PSP Greece as a customer (e.g. pricing, contract supervision)
    - ✓ Product Manager : The liaison between the Lead Developer and PSP Greece as a customer (e.g. innovation services, optimization). In close collaboration with Account Manager.

- ✓ Lead Developer : Technology professional with coding, business analysis and mentoring skills who has an overview of the system and manages development teams.
- ✓ Senior/Junior Developer: Technology professional with programming expertise supporting development projects and ticket resolving tasks.

- **Functional and technical requirements for self-assessment**, there are mandatory and desirable elements. To be compliant technically, your company must provide all mandatory services.

7 Content of the Offer and Evaluation

7.1 Technical evaluation

Pre-selection criteria	Documents & information to be provided to establish compliance with the evaluation criteria
Eligibility to provide services in Europe	To be eligible to participate at this bidding, your company **must be registered and based in Europe.** To establish compliance with this criterion, please send with your technical response form: (1) your company registration certificate and (2) fill out vendor registration form. (3) confirm the HQ of the proposed account management team (city & country).
Service requirements	**Documents & information to be provided to establish compliance with the evaluation criteria**
Annex B tab 2, named "functional requirements"	Please fill out Annex B, use the drop-down menu for self-assessment and add comments. To be consider your proposal as technically compliant, all services listed as mandatory functional requirements are to be provided. To be compliant technically, your company must provide all mandatory services.
Annex B tab 2, named "technical requirements "	Please fill out Annex B, use the drop-down menu for self-assessment and add comments. To be consider your proposal as technically compliant, all services listed as mandatory functional requirements are to be provided. To be compliant technically, your company must provide all mandatory services.
The following section lists all requirements for scoring; only bidders that will score equal or above 42 points (of the 70 points) will be considered for financial evaluation.	
Clients and similar projects (30 points)	Provide a list of clients on Annex B (tab company profile) from non-for-profit and private sectors from the past 5 years (current and former clients in total).

	The scores will be allocated based on the number of clients <u>undertaken similar projects</u> in total.
Project management Team (40 points)	Please add a short CV of the following technical experts required to manage UNHCR account as per main tasks described hereunder. Please use Annex B technical response form, tab 1, to provide this information OR you can also attach a max half A4 page CV for each expert listed hereunder **1. Account Manager**: The liaison between the company and PSP Greece as a customer (e.g. pricing, contract supervision) **2.Product Manager**: The liaison between the Lead Developer and PSP Greece as a customer (e.g. innovation services, optimization). In close collaboration with Account Manager. **3.Lead Developer**: Technology professional with coding, business analysis and mentoring skills who has an overview of the system and manages development teams. **4.Senior/Junior Developer**: Technology professional with programming expertise supporting development projects and ticket resolving tasks. The scores will be allocated based on the number of relevant years of experience in the database management field.

7.2   Financial evaluation

The financial proposal is to be submitted ONLY by filling in the financial offer (Annex C). No other format will be accepted.

The max score allocated to the financial components is 30% (of the total scores), i.e., max 30 points.

The maximum number of points will be allotted to the lowest price offer compared to the other technically compliant price offers received.. All other price offers will receive points in inverse proportion to the lowest price.; e.g., [total Price Component] x [lowest] / [other] = points for other supplier's Price Component.

8   Key Performance Indicators

UNHCR expects to monitor the performance of the selected supplier on a yearly basis according to the following KPIs:
* Assessment of system stability
* Number of critical issues affecting payment management, and their resolution
* Number of critical issues about the system operation, and their resolution
* Response rate for functional/technical development requests (including lead time)
* System server downtime
* System log monitoring