Annex A: Terms of Reference
RFP/2017/906
Global Donation Landing Page CMS System

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# 1 Introduction

The Office of the United Nations High Commissioner for Refugees (UNHCR) was established by the U.N. General Assembly in 1950 to provide protection and assistance to refugees and Internally Displaced People (IDPs). In more than five decades, the agency has helped tens of millions people to restart their lives. Today, UNHCR is one of the world's principal humanitarian agencies. Its staff of more than 7,190 personnel is helping more than 36.4 million people in more than 127 countries. Staff members work in a diversity of locations and conditions including in our Geneva-based Headquarters (HQ) and more than 100 field locations. For more information, please see http://www.unhcr.org.

UNHCR's Public Sector Partnership (PSP) Section raised over USD 208 million in 2015 which is almost entirely funded by voluntary contribution. Donations are sought every year for UNHCR's Annual Programme Budget, which includes the support of regular operations. But the agency also launches supplementary appeals throughout the year, seeking extra donations for new emergencies that cannot be forecast in advance.

PSP has two key fundraising programs, Individual giving (Face to Face, DRTV, Digital) and Leadership giving (corporates, foundations and major donors). It is actively fundraising in Spain, Italy, Germany, Sweden, UK, US, Canada, Hong Kong, Thailand, Philippines, Australia, Japan, Netherlands, France, MENA (Middle East and North Africa), Brazil, Mexico, and South Korea. Our international website:
www.unhcr.org accepts donations from all over the world through our donation landing pages donate.unhcr.org/int-en/general-eur (example)

UNHCR is looking to develop a global donation landing page CMS system which integrates with both a global and locally tailored payment solutions and database/s. The donation landing page system is intended to bring significant benefits to the UNHCR online donation programmes, streamline our online giving process, and make it quick, easy and secure for supporters to make an online donation from anywhere in the world in whatever currency and language they choose. It is also intended that this system will be a 'best of breed' system that is flexible enough to cover all international markets and is supported by a long term development roadmap for new features and investments.

UNHCR is aiming to boost online contributions to UNHCR globally to deliver long-term sustainable solutions that provide security, dignity and a future for refugees. With our strategy of 'Digital First' we will look first for digital opportunities in everything we do, locally and globally. Our global investment will prioritise rapid expansion of digital supporter engagement and online donations are expected to deliver dramatic and sustained growth of donor recruitment programmes.

This project has been initiated by UNHCR's Division of External Relations (DER) in order to ensure that UNHCR has a frame agreement/s in place with a payment gateway provider/s to enable our rapid growth of online donations.

## *1.1 Background*

- In 2017 we expect more than eight percent of UNHCR revenue will be generated from private sector sources through the fundraising and engagement activities of the global network of six National Partners and several country and regional offices.
- In all UNHCR has private sector fundraising operations in 27 markets.

## *1.2 Statement of Purpose & Objectives*

UNHCR is a global organisation, and as such any new system would need provide a secure and flexible global donation CMS system which enables full content management of donation pages and is able to integrate with local and global payment gateways. The system needs to be securely hosted, easy to use (both internally and for the donor), error free, flexible has the potential to substantially increase conversion rates and number of transactions globally.

An internal team within the Digital Engagement Section based in Copenhagen will be assigned to the project; as such there may be multiple contacts for the agency. The role of the internal team will be to provide input and approval on platform functionalities, to act as intermediary between national offices and the bidder and to bring functional and/or technical knowledge of UNHCR to the bidder team as needed.

The successful bidder(s) is expected to be awarded a Frame Agreement for the duration of two years, with a one year possible extension.

# 2 Requirements

## 2.1 Core requirements

UNHCR is looking to secure a multi-language donation landing page management system provider.

The global donation platform will be a 'best of breed' system that is flexible enough to cover all international markets and is supported by a long term development roadmap for new features and investments.

The system would need to be a robust, easy to use (both internally and for the donor), error free, flexible and quick donation system that has the potential to substantially increase conversion rates and number of transactions globally.

The system will be used by multiple fundraising offices around the world, therefore the system must support multi user accounts and master account structure. We are looking for the system to deliver flexible templates that can be optimised fully on layout, structure, and different payment methods, including single and multiple step journeys to donation.

The system must meet the following requirements as standard:

- PCI compliancy
- Single step and multi-step donation process
- Enable recurring transactions
- Flexible CMS design to enable payment by direct debit; as well as supporting different local and alternative payment methods
- Secure data capture and SSL Certificate
- Flexible and user friendly CMS
- Support of UTF8 characters (such as Arabic and Chinese) on both donation page and database
- Ability to insert tracking and advertisers code
- User login with access to activity history
- Setup different merchant accounts with different user access levels for each
- Ability for design to accommodate either one step or multiple step journey to donations.
- Best of breed design tested for usability and easy conversion.
- Ease of use – the system must be simple to use and to set up pages. Internal structure with good folder system and navigation.

**Donation Page/s**
Creative elements

- Layout to be optimised across multiple devices (ie Mobile/tablet)Flexible design template/s
- Language dropdown (mapped to other pages within the system)
- Ability to add media content to the page including video, pictures, photo galleries with captions and external links
- Ability to create a personalised experience based on user history
- See also Page Editor (Content Management) section below
- Form elements:
    - to be easily customised through the CMS and stored in a database
    - Ability to apply a number of gift 'prompts' for each type of giving

    - Ability to assign any field as mandatory or optional
    - Error message for mandatory fields
    - Global telephone number/address validation (AVS) using number structure and address formats via an international data base to reduce typing errors and user mistakes (country specific)
    - Ability to apply Quick Address search functionality using partial addresses/post codes and for use in multiple countries
    - Country 'drop down' should default to the country of origin based on user IP
- Ability to pass a range of custom parameters to the payments engine (i.e. donation amount, appeal codes, recurring payment day, etc.)
- Ability for donor to select from the following giving types
    - One-Time Giving
    - Recurring Giving
    - Cash Gift
    - Sign up (lead generation)
- Ability to switch from Single and Regular donation form on the same donation page (no redirect to another page)
- Ability to change currency within the page
- Donor contact information and payment information on one page (single step process)
- Capture of banking data for offline processing (direct debits) – these will need to be bespoke/flexible and be suitable for multiple international markets
- Capture of payment card details for offline processing (enable to pass encrypted donor data)
- Auto-populate the donation amount from a previous landing page or donation amount option. I.e. on Thank Page - "Thank you for your donation of $X."
- IP/Geolocation redirect – Detect where the donor is coming from based on IP and Geolocation and redirect to relevant country / language specific landing page.
    - Internally (hard redirects): pages built within the system
    - Externally (soft redirects): pages built outside of the system giving an option to the user to move away from the site or stay.

**Automated Exit Page**

- Auto generated bounce back web page showing donor **either** 'successful donation' page thank you, **or** a 'failed donation' thank you page (depending on accept/reject payment) – and ability to edit these with CMS.
- Different landing pages should link to Thank-You pages specific to that page
- Ability to show video content
- Facility to add social share buttons with customised messages
- Bounce back page and email confirmations should be fully customisable from CMS and have consistent html content/branding to landing pages, with ability to upload email html templates
- Ability to provide receipt of payment and other information given by donor
- User friendly URL
- Unique URL for each exit page

**Page Editor (Content Management)**

- Ability to offer flexibility in creating new templates for landing pages via the CMS with different copy and images.
- Ability to create multiple donation pages with different templates
- Ability to select from a pre-defined list of form elements to add/remove from page i.e. currencies, payment methods, where heard etc.

- Ability to upload a selection of data capture fields from a pre-defined list (e.g. country list)
- Ability to preview end to end process for testing purposes before publishing new content
- Support Multilanguage and non-western European languages including Arabic (Right-to-Left text display), Russian and Chinese (Simplified/Traditional)
- Ability to enter tracking/tagging code on <head> and <body> html tags
- Ability to customize page URL's including thank you page URL (not dynamic URL's)
- Ability to customize thank you pages copy
- Ability to apply a range of 'earmarking' codes for each payment relevant to UNHCR fundraising campaigns
- Ability to setup different merchant codes and selecting payment methods
- Compatible with all major international browsers and mobile browsers
- Ability to upload images and videos, with a guide to recommended size/size/pixel
- The system should be flexible with regard as to where images can be placed.
- Ability to edit CSS
- Ability to edit form validation
- Ability to edit metadata for SEO (URL, title, description, social tags, etc.) Fast loading time with buffer time for countries with slow connection
- W3C valid
- Ability to add multiple 'opt in' selection for data protection etc.
- Ability to organize donation pages in the CMS in folder or other structure.
- Ability to setup different payment amounts/display currency, while setting up minimum/maximum accepted amounts
- Ability to specify debit date

**Reporting**

- Provide reporting of donations by
  - 'Name/theme' of the page i.e. to have the facility to report by 'appeal' (Syria Emergency, Education, etc.)
  - Giving type (ie, Single donations, recurring gifts)
  - Amounts
  - Country
  - Newsletter subscription
- Enable export of data from the system in a specified csv format (house file format) – to be defined and scoped.
- Applying filters to exported data

**Analytics**

- Ability to utilise Google analytics identifier for each page where the payment engine is used
- Ability to edit <head> and <body> html of both 'main' and 'thank you ' pages via CMS or direct access to page files (for Google Adwords tracking
- Ability to monitor drop-off trends
- Ability to monitor times through the process for completed payments/drop offs
- Ability to add custom code as required
- Ability to add other third party custom codes

**CMS Integrations:**

- **Offer flexibility to integrate with various Payment Gateways (including Worldpay, Stripe, Wirecard and others)**
- **Enabled for integration with CRM databases (including Salesforce and others)**
- **Enabled for integration with 3rd party email providers (including Salesforce Marketing Cloud and others)**

**Security**
Charities are targeted regularly by fraudsters who trial transactions on stolen card details to check if the cards are working. As a result, the following fraud prevention methods are important to ensure the reliability and integrity of the service is upheld. The following may be features of either the payments provider or the donation system.

- https:// in the address bar – SSL certification
- the padlock icon (double click to see details of security certificate)
- logos from third party verification services
- Option to use 3D secure authentication where appropriate
- Verified by Visa
- MasterCard Secure Card
- J/Secure
- Standard card validation services such as AVS and CVN
- Conditional rules for filtering out fraudulent transactions (based for example on email address and IP)
- When banking data is collected the requirements differ country by country.

There is no official universal standard. The basic requirement is secure data collection and ensures that the data is stored in a secure database. Some local requirements may exist in each market, e.g., the UK banks require account validation software to be integrated.

All companies must detail:
- How they ensure that donors financial details are secure (PCI)
- What measures they take to ensure donor details are held according international data protection laws
- How they can ensure that we will receive a high availability of service uptime and what they can guarantee.

**Hosting**
A more detailed specification will be produced once we have appointed a supplier. However, the below we would consider a minimum requirement.

- The ability to 'scale up and down' hosting capacity quickly and easily for major appeals
- Third party must provide strong service provision in relation to downtimes/response times
- A full and robust disaster recovery process and procedure (documented)
- Regular and thorough load testing
- A minimum requirement of 1000 concurrent users

## *2.2 Other services, required for the performance of the key requirements*

Specifically we are seeking a provider with a flexible, safe and reliable online donation system which is able to provide the following:

**Integration with third party payments gateways**
We expect the global donation system to be integrated with PCI compliant third party country specific/currency/payment gateways such as Worldpay Corporate Gateway, Stripe, Wirecard, SagePay etc. to provide real-time processing of credit cards and other alternative payment options if available such as mobile pay, direct debit, Alipay, and other regional payment methods.

UNHCR would select a specific banking counterparty to facilitate the payment gateway integration and where these donations would be regularly credited directly to a dedicated bank account and Merchant Account/s.

**Integration with third party databases**

Most UNHCR offices would prefer to have a payment system that passes data securely to their in-house databases automatically. Ideally we would also need the system to have an API to enable easy integration with third party systems such as donor database, email broadcast tool etc.

Lower risk data such as donor's contact data and donation amounts should be stored by the donation system database. However, high risk data such as credit card data should be hosted by the payment gateway/banking provider (unless supplier solution is fully PCI compliant). The third party payment service provider will secure the payment data on behalf of the UNHCR.

**Service Levels and Support**

Full specifications will be required on appointment of supplier – the following is a basic guide only.

- Agile and expert technical support and full prioritisation processes for bug fixes and technical queries
- Automated and fully documented process/procedure for error monitoring and logging
- Training for UNHCR staff on the product
- Fully documented user specifications – updated regularly
- 24 hour support desk on request (for larger appeals and campaigns)

**The Expected Role of the Bidder**

The bidder is expected to give details and demonstration of the functionalities and technical requirements of the solution.

The bidder is expected to provide a Focal Point to lead collaboration with the UNHCR regional teams/ Global Project Managers.
Similarly, the bidder will be asked to assist the UNHCR team with the transfer of applicable functional and technical knowledge to UNHCR resources.
The bidder is also expected to give details of the skill sets to support the project including on-going requirements from UNHCR. The bidder is requested to clearly state any assumptions of deliverables, facilities or resources they expect UNHCR to provide.

The desired provider should have:

- Relevant experience with non-profits and/or organizations with similar goals
- Relevant experience with delivering donation landing page CMS systems with non-profit and/or organizations with similar goals
- Relevant experience in integration with third party country specific payment gateway systems and databases
- Relevant experience of international e-commerce, and online payments legislations
- Relevant experience of online conversion and optimisation techniques and best practice for online donation pages including knowledge of data protection legislation.

**Risk Management**

The bidder will assume a direct responsibility for risk management to the extent that project deliverables should not be imperilled. To this end, the bidder will work with UNHCR project management to ensure that risk is at all times identified in a timely manner, and managed to

ensure that the project is not adversely impacted. Appropriate documentation will be maintained for UNHCR project management.

## *2.3 Customer Responsibilities*

UNHCR is responsible for providing the following:

- Liaising with the Contractor, attends regular project management calls and meetings
- Assigning a dedicated project manager and liaising internally with key stakeholders
- Reconciling reports submitted by the Contractor
- The Digital Engagement team will be the main point of contact initially, with other teams being introduced as needed. Other regional fundraising around the world will be the main point of contact for the agency (ies) local account service teams.

# 3 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:

## *3.1 Company Qualifications*

- A description of your company with evidence of your company's capacity to perform the services required, including: Company profile, registration certificate, security certificates, and last audit reports
- 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;
- Experience in the business or the number of similar and successfully completed projects
- Number of similar projects currently underway;
- Any relevant experience working with UNHCR, other UN Agencies and NGOs should be included;
- Total number of clients, please provide a list;
- You are requested to provide three (3) references that we may contact from your current client list
- Security certificate

## *3.2 Proposed Services*

Please submit a written proposal outlining:

- How you intend to develop the above mentioned services as per requirements stated in section 2.1 and 2.2),
- Timescales of delivery of work project.

## *3.3 Personnel Qualifications*

A list of the core staff to be assigned to this project for any technical support/set up, ongoing account management, and global payment authorization optimisation support.

## *3.4 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).

## *3.5 Applicable General Conditions*

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

# 4 Evaluation

## 4.1 Technical Evaluation

The **Technical offer** will be evaluated using inter alia the following criteria and percentage distribution: **70%** from the total score.

| CRITERIA DESCRIPTION | Score |
|---|---|
| General Liability/Capacity of the Company | 5 |
| Experience of conducting similar projects including extensive e-commerce and donor journey knowledge | 7.5 |
| Experience of working on similar projects for NFP's, UN Agencies and international clients (multi language) | 5 |
| Security of proposed service and hosting abilities | 5 |
| Comprehensiveness and technical ability of submitted written proposal and WebEx presentation of CMS product | 10 |
| Quality/ Creativity of proposed product and all other services offered based on the written submission and on the WebEx presentation | 15 |
| Integration with third party payment gateways and databases (WP, Stripe, Salesforce, other) | 7.5 |
| Experience of core people and support teams including Service Levels and Support (SLA's) | 15 |
| **TOTAL TECHNICAL SCORE (Max = 70; Min 42)** | **70** |

Agencies will be asked to deliver a presentation on their proposal and to introduce the team members who will work with UNHCR via WebEx. This is expected to be one hour maximum. This presentation will form part of the technical evaluation.

The minimum passing score is 42 out of 70 points; if a bid does not meet this minimum it will be deemed technically non-compliant and will not proceed to the financial evaluation.

# 5 Key Performance Indicators

## *5.1 Performance Evaluation*

UNHCR expects to monitor the performance of the selected supplier according to the following KPIs:

- Delivery of commissioned work on schedule
- Quality of product and service.