TERMS OF REFERENCE FOR INSTITUTIONAL CONTRACTS

Requesting Section: PFP -RSC Bangkok, UNICEF EAPRO

Terms of Reference for CORE System Localization Services in Indonesia, Malaysia and Philippines

1.   Background

UNICEF – the United Nations Children's Fund- is an international organization working to realize the rights of children all around the world with presence in over 190 countries and territories. UNICEF operates its programmes fully with the generous donations received from governments, the private sector, as well as individuals. UNICEF mobilizes support from the private sector as well as generous individuals which is critical to delivering its programmes for children.

The support of individuals is critical for UNICEF to achieve its mandate for children. The organization recognizes the value of growing, engaging, and retaining individual supporters (financial donors and non-financial supporters) and strives to offer them meaningful journeys.

UNICEF's current supporter database systems in many country offices are, to a large extent, running on legacy system, i.e., Donor Perfect Online / Donor Perfect Visual (DPO/DPV). The lack of a modern Customer Relationship Management (CRM) means UNICEF is falling behind other organizations in areas that should provide opportunities for growth and is not optimizing or maximizing existing investments in the recruitment and retention of its supporter base. It also raises data security concerns.

To address the above concerns, UNICEF is transitioning from its legacy donor management system to a leading supporter (donor, volunteer, digital follower) management system, i.e. Salesforce technology-based CRM. Salesforce technology will help UNICEF in laying a foundation for a network of millions of supporters who will take action for children. A new CRM system will enhance UNICEF's ability to better manage contacts, enhance advocacy, marketing and engagement strategies with personalized content, better its development and fundraising approaches, make decisions based on enhanced analytics, and count on a solid infrastructure and security system to attract and cultivate donors, volunteers, and digital followers. It will also integrate seamlessly with the ecosystem of UNICEF's applications and enterprise architecture to serve ONE TRUTH of data and business intelligence across organization.

For the past few years and working with partners, UNICEF has developed the implementation methodology and has rolled out the solution in India as a pilot to guide the solution that is being developed and localized in other countries. Currently UNICEF is developing the next version of the CRM as a CORE solution[1] with the planned rollout to Colombia and Thailand by end of 2021. The marketing strategy development and personalization of content activities will run in parallel and will make full use of the integrated CRM system with existing digital tools.

The engagement herewith seeks an implementing agency to perform the adaptation and implementation of the CORE solution for Indonesia, Malaysia and Philippines. The CORE solution is a supporter engagement and digital fundraising solution based on Salesforce technology developed to address global needs with the flexibility to be adapted to local fundraising markers. CORE is a set of global functionalities common to all or most UNICEF offices are being developed and contained in a managed package. Managed package will be

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[1] The CORE solution is a Salesforce managed package that provides a core data model while enabling distribution to Regional UNICEF Salesforce instance in country offices. The main purpose of the CORE solution is to provide a set of fundraising and marketing functions that enforce consistency of fundamental features, while enabling the country office to further enhance and localize these features further based on their unique needs

installed in the regional Sales cloud org by HQ team and will be available to the local implementing agency for localization based on the market's need. The local development will follow the principles of distributed application development under the technical guidelines, design standards and release management principles set by UNICEF Enterprise Architecture council.

In addition, the role of the agency is to help the countries to design multi-channel personalized supporter journeys using the Marketing Cloud. The agency will work closely with the global UNICEF Technology and Marketing teams.

While the current territory for service is focused on Indonesia, Malaysia and Philippines, it is possible that UNICEF will expand similar activity in other countries including China, Vietnam, Sri Lanka and Bangladesh in the future. If the bidder is already active in any other country, and / or plans to establish business in the additional countries, kindly include this information in the technical proposal Annex C.

NB. Bidders are welcome to tender for one, several or all countries as mentioned (Indonesia, Malaysia and Philippines). While UNICEF is open to contract countries to different service providers, potential synergies and savings through knowledge transfer between countries should be highlighted (i.e. discounts or reduced financial proposals apply in case one bidder will be contracted for several or all assignments).

2.   Objectives, Purpose & Expected results

As part of the local rollout of the CORE solution for fundraising and marketing operations utilizing the Salesforce platform, UNICEF is looking for an agency who can provide services for the following seven areas:

   a) **Business analysis** to capture requirements for localization of the Core solution to meet the specific needs of the country and to lead User Acceptance Testing, and coordinate training sessions
   b) **Data migration services** to extract, cleanse, transform and load the required data from existing systems including DPO to final Salesforce CRM platform
   c) **Data Integration services** to identify and develop integration components under established development framework
   d) Reporting and Analytics service to identify and develop analytical solution using sales/service cloud and Power BI Platform
   e) **Salesforce development services** to design and build customization and enhancements to Sales Cloud CORE package as part of localization
   f) **Marketing Cloud (MC) expertise** to help upskill and build capacity with country office staff, with three major functions: 1) help with the roll out of the UNICEF-designed Marketing Cloud training workshops (to be led by UNICEF HQ in Geneva), 2) ensure best practices are used when building journeys and utilizing the various capacities of the Marketing Cloud, and 3) support the local team to plan, build and refine journeys and emails that replace and improve their current journeys (and add any missing journeys as needed)
   g) **Project Management** to assist the global and local project teams to organize local resources, track and coordinate daily local activities. Work closely with the two global business and technical project managers to plan, execute and provide status updates on all aspects of implementation.

3.   Description of the assignment (Scope of Work and Responsibilities)

3.1 Business Analysis Services
   - Works closely with UNICEF country office users and project team members to conduct discovery session, identify and document the overall localization needs of the CORE Salesforce solution into a Solutions Design Document with relevant user stories.
   - Capture and document payment processing requirements
   - Capturing data migration needs and approach

- Capturing and documenting integration requirements and approach
- Documenting customization and enhancements needed to the Sales Cloud CORE package (localization),
- Capturing and documenting Marketing Cloud (MC) requirements and configuration approach (reporting needs, tracking requirements, email subscription options, transactional message needs, journeys, etc.)
- Coordinating functional training on CORE and Marketing Cloud functions
- Providing functional, technical and SME support to the overall project team
- Creating and updating user stories and acceptance criteria and assist in story prioritization and solutioning throughout the implementation process
- Supporting local country team with implementation / go live activities by providing support and guidance on both business and technical aspects. Configure system as required
- Coordinating with UNICEF's project managers in completion of activities according to project milestones
- Assisting with progress tracking and reporting by coordinating and participating in
  - Daily project related meetings (standup meeting, design/configuration sessions, etc.)
  - Weekly PM meetings
- Proactively highlight any risks – work out mitigations in collaboration with other UNICEF project members
- Responsible for User Story documentation and maintenance
- Facilitates solution demos to business stakeholders
- Implementing and documenting Salesforce system configurations
- Conducting unit testing of Salesforce configurations
- Facilitating and documenting acceptance criteria
- Compiling system user guides for final users
- Leading User Acceptance testing

3.2 Project Manager
- Facilitates regular standup meetings as needed
- Acts as interlocutor/coordinator between the global and local team on a daily basis, as well as among the different teams within the country office (Communication and Fundraising)
- Maintains burndown data and reports
- Coordinates Sprint reviews and Sprint planning sessions
- Ensures efficiency of all processes related to this project with limited redundancies and ensures maximization of the tight schedules of the working team members
- Develops and maintains a project timeline and works closely with the team to ensure meeting agreed deadlines and identifies/offers solutions for resolving bottlenecks

3.3 Data Migration services
- The purpose of this role is to lead all activities related to migration of data from DPO and other sources to Salesforce platform specifically Sales Cloud CRM solution.
- The consultant will liaise with country office DPO manager, application experts and global project team to migrate data from legacy systems to Salesforce platform.

Key Tasks and Deliverables
- In collaboration with DPO power users, DPO administrators and the broader project team, including external partners, leads define and document the full extraction, transformation and loading (ETL) methodology and plan
- Working closely with local DPO administrators extract DPO and related data from legacy systems
- Define and document mapping documents for transformation of data from legacy to target system
- In cooperation with local project team identify, document and execute activities for cleansing the data prior to load procedures

- When applicable develop automated tools and procedures for the ETL and cleansing steps
- Conduct the migration in series of test and validation phases prior to final load of data for go-live phase of the project

3.4 Integration Service

- The purpose of this role is to develop integration solutions for in country Salesforce Implementation utilizing Azure Integration Services.
- The contractor will liaise with country analysts/application teams and contribute to integration solution planning.
- The contractor will work under established development frameworks and work under technical guidance of Technical Product Owner and Solution Engineering Team.

Key Tasks and Deliverables

- Develop integration solutions including ETL process, REST APIs, Event Driven/Queue based integration solutions using Azure Integration Services.
- Enhance implemented CI/CD processes to support new and existing integration solutions.
- Build integration solution for large data volume processing in Salesforce Platform
- Analyze integration requirements and work closely with relevant application teams and contribute to solution design
- Develop reusable microservices and APIs for data exchange between salesforce and external applications
  - Building proof of Concepts to articulate how a business problem can be addressed
  - Liaising with solution engineering team, business analysts and other development teams, including external partners, to ensure delivered integration solutions are implemented following correct architectural frameworks.
- Document all completed solution and configurations.
- Ensure knowledge transfer to staff members.

3.5 Salesforce Development Services

- The purpose of this role is to provide Salesforce development services to design and develop customization Salesforce Sales Cloud platform
- Perform Salesforce administration and configurations including; maintain user profiles, role hierarchies, sharing rules, reporting, custom object creation, process builder, validation and workflow rules, campaign management, page layouts, records types, approval process, email templates.
- Manages all security settings and conduct regular security/configuration audits
- Develop APEX classes, Lightning components to support local business requirement
- Ensure develop follows established governance and release management process
- Apply full stack approach to solution design through planning, testing, implementing, deploying and operations of solutions
- Build high quality applications championing the modular design, reusable components, separation of concern, high cohesion and loose coupling architecture
- Work with wider UNICEF technical team, including external partner agencies, on integration requirement and develop applications that connects to multiple applications

3.6 Marketing Cloud Expertise

- Provide support to map supporter journeys, identify life cycle, sale funnels and data flows.
- Provide functional design, process design (scenario design, flow mapping, customer journeys), prototyping, configuration, testing, and training
- Assist in building, maintaining and optimizing supporter journeys and automations in Marketing Cloud.
- Configure and set-up data models (lists, data extensions, shared data extensions, contact model) which facilitate segmentation tasks to final users.

- Localize the email templates using HTML and CSS, fully responsible and in a modular way to allow final user without HTML knowledge to edit and build email campaigns.
- Experience using AMP Script for personalization, Marketing Cloud Connect functionality, Marketing Cloud Einstein, GA 360 with MC
- Collaborate in the rollout of the different MC workshops planned for the country and facilitate additional learning and upskilling of CO team as required. These are pre-made workshops configured and delivered by UNICEF global team
- Provide best practices to maximize the use of MC
- Provide ongoing operational and technical support to the market to assist with the continual improvement of donor experience delivered through Marketing Cloud

4. Deliverables

The contactor will deliver against the 3 phases outlined, as follows:

Phase 1- Local Business Requirements Gathering: This phase ensures all the local country needs are identified and documented for technical and business execution.

Phase 2 - Implementation : This phase is a combination of technical work and business practices. This will focus on implementing SES platform in the country as per the scope defined in phase I. Activities that completed in this phase are:
   i. Implementation of Sales and Service cloud functionalities
   ii. Implementation Partner community
   iii. Implementation of online donation system that consists of front end CMS, payment gateway and salesforce
   iv. Develop and integrate banking interfaces and files
   v. Integration with third party applications and agencies
   vi. Data migration from legacy applications such as DPO into Salesforce
   vii. Configuration of Marketing cloud (emails ,journeys, automation)
   viii. Development of reports, dashboards in Sales/Service cloud and Power BI platform

Phase 3- Readiness Assessment and Production Support Planning: This phase ensures all systems are thoroughly tested, processes are documented and operating as defined, training documentation and training plans are developed, and enhancements are identified and scoped and system is handed over to UNICEF team

Timeline for phase 1: Local Business Requirement Gathering should be as follows:
- UNICEF Indonesia: September 2021
- UNICEF Malaysia: Q2 of 2022
- UNICEF Philippines: Q1 of 2023
- Other Countries - TBD

DETAILED DELIVERABLES

4.1 Local Business Requirements deliverables

A. A set of documents with country-specific business and technical requirements that can be used as guidelines in the implementation of the CRM and its business practices, including:
- Document detail business requirements
- Produce well structured user stories and process mapping
- Data migration needs and approach

- Systems integration requirements and approach
- Customization and enhancements needed to the Sales Cloud CORE package
- Marketing Cloud (MC) requirements and configuration approach (reporting needs, tracking requirements, email subscription options, transactional message needs, journeys, etc.)

B. Functional, technical and SME to support the overall project team and achieve the following:
- Completion of country office training on CORE and Marketing Cloud functions
- Created and Updated user stories and acceptance criteria to guide the business and technical requirements
- CRM, payment, fundraising systems fully documented, configured and tested
- Compiled systems user guides
- Project milestones fully met and documented
- Documented risks with proposed mitigation plans

4.2 SES Platform Implementation
- Implementation of Sales, Service, Experience cloud as per local need
- Implementation of integration components and interface (payment, banking files, third party application etc.)
- Successful connection of the MC to the newly implemented Sales Cloud
- Completed basic set of training sessions developed by the global team
- Completed second set of training sessions developed by the global team
- Live and tested connection of the MC to the newly implemented Sales Cloud
- Redesign of the existing supporter journeys, fully migrated and tested in the MC Fully delivered and tested operational functions of the local SC instance, including payments, fulfillment, partner community setup, donor care
- Data from various repositories of supporter data cleansed, fully migrated and de-dupped, integrated in the new system, and tested for accuracy.

4.3 Readiness Assessment and Production Support Planning
- This phase ensures all systems are thoroughly tested, processes are documented and operating as defined, training documentation and training plans are developed, and enhancements are identified and scoped.
- Fully tested ecosystem, with all relevant technical and architectural components appropriately documented.
- Documented set of new operational procedures as it relates to fundraising activities, volunteer data management and ongoing synchronization of databases.
- Documentation of training sessions to fulfill ongoing training needs.

5. Reporting requirements

As indicated under roles and responsibilities, frequent and regular contact with UNICEF focal point to ensure clear communication, expectations, and update project progress and performance.

6. Location and Duration

- It is preferred that the contractor has physical presence in the country(ies) that they bid for.
- The service provider must be flexible and available as needed to work virtually with wider project team based in New York ,Geneva and Valencia.
- UNICEF is seeking to establish a twelve- month Institutional contract for each UNICEF country office with starting tentative dates as follows:
- UNICEF Indonesia: September 2021

- UNICEF Malaysia: Q2 of 2022
- UNICEF Philippines: Q1 of 2023
- Other Countries - TBD

7.   Qualification requirements or Specialized skills/Experience Required

7.1 Requirements for Business Analysts and Project Manager
- University degree in related subject
- Minimum of 5+ years of hands-on experience implementing enterprise scale solutions (CRM, marketing applications with complex customizations and integration needs)
- Knowledge of the Salesforce platform specifically Sales Cloud, Service Cloud and Marketing Cloud
- Excellent verbal and communication skills
- Experience with Agile and Scrum methodologies and usage of agile systems such as Microsoft DevOps or JIRA
- Experience of working with country team, business group and end users to gather, understand, and define business requirements and translate the requirements into technical briefs.
- Experience of develop user stories and to-be process flows to delivery business requirements.
- Experience of collaborating with developers and external parties to delivery complex requirements and verify that solutions will meet the business requirements.
- Proven project management skills working with multiple teams in different layers of a large and global organization- preferably with non-profit/international organizations.
- Proven ability to deliver large projects within the agreed timeframe.
- Fluent in English

7.2 Requirements for Data Migration Services
- University degree in Computer Science, Information systems management or related field.
- Minimum of 5+ years of hands-on experience developing and providing data migration services.
- Strong experience with SQL language and Microsoft SQL Server platform for data management, data analysis and overall data migration automation.
- Experience of producing highly detailed reusable artifacts (such as data migration runbook, mapping document, transformation logic) and maintain them for the duration of projects.
- Experience of developing data mapping, transformation/conversion logic from source system to target system (Salesforce)
- Experience of developing script for data cleaning and de-dup to drive accuracy and completeness of data and resolve as needed.
- Experiencing of documenting and validating data migration design specifications with key users and stakeholders
- Experience with Salesforce data model and large volume data management
- Excellent communication skills, both written and verbal.
- Proficient in English

7.3 Requirements of Integration Services
- University degree in Computer Science, Information systems management or related field.
- Minimum of 5+ years of hands-on experience developing and deploying integration solutions, using Microsoft Azure Integration Services to connect a mixture of on-premises, SaaS, and cloud-hosted applications.
- Strong experience with CI/CD process leveraging ARM Templates and Azure DevOps.
- Strong Experience with Azure Logic Apps, API Management, Service Bus, DevOps Pipelines, Azure Data Factory, SQL Databases and Azure Functions.
- Experience of working on payments apps/aggregator and fundraising experience for non-profit
- Strong Experience with designing Restful Web service, Swagger and with Data transformation

languages (XSLT, Liquid)
- Highly proficient in C#, .NET, Apex, JavaScript and Visual Studio.
- Experience with Salesforce Sales/Marketing Cloud.
- Experience writing PowerShell, Bash, Python, NodeJS and Perl.
- Excellent English communication skills, both written and verbal.

7.4 Requirements Salesforce Development Services
- Demonstrated understanding of the Salesforce platform (Sales Cloud, Marketing Cloud, Community cloud, Einstein Analytics)
- Experience in building applications using Lightning components, APEX, Visualforce and UI related coding technologies, Salesforce.com Web Services APIs - Force.com SOAP and REST-based Web Service APIs, the Bulk API, and the Metadata API.
- Development including solid experience in HTML5, JavaScript, jQuery, ExtJS and CSS, SQL, JSON, AmpScript
- Experience of deployments and migrations tools (Salesforce DX, GitHub, CI/CD, Azure Dev Ops)
- Industry qualifications in Salesforce platform (Salesforce.com Platform Developer I/II)
- Proficient in English

7.5 Requirements of Marketing Cloud Expertise
- University degree in related subject
- Salesforce Marketing Cloud Certification(s) (Marketing Cloud Email Specialist, Marketing Cloud Consultant, Marketing Cloud Administrator)
- Salesforce Sales Cloud or Service Cloud expertise
- Deep knowledge of the SFMC platform
- Minimum of 5+ years of hands-on experience implementing Marketing Cloud
- Proficient in Marketing cloud connector and Integration with service/sales cloud Integration with external systems and knowledge of DMP and data integration is key
- Knowledge of data architectural & integration principles
- Proficient in Amp scripting and content builder
- Significant experience using the Marketing Cloud Email application tools in executing both tactical and strategic email campaigns.
- Experience with SQL scripting for automated and triggered deployments
- Experience designing automations and analytical data processes to obtain the best performance by connecting multiplatform data through all channels
- Experience creating and optimizing individual multichannel journeys for customers using Salesforce registers
- Knowledge of journey mapping
- Experience with building and validating HTML and developing digital content for online marketing campaigns and communications (including email, web, mobile and/or social).
- Strong project management skills
- Experience of teaching and training others to use the platform effectively
- Excellent English communication skills, both written and verbal

7.6 Requirements of Analytics and Reporting
- Offer additional custom reports in Salesforce Sales and Marketing Cloud to meet the country office needs, such as:
  - Sales Cloud: Performance campaign; Pledge fulfilment; Campaign data upload
  - Payments: Payment Performance
  - Marketing Cloud: Journey Performance
- Build new reports and dashboards in PowerBI by leveraging the existing data replication of Salesforce objects into Azure.

8. Evaluation process and methods

The evaluation panel will first review each response for compliance with the mandatory requirements of this RFPS. Failure to comply with any of the terms and conditions contained in this RFPS, including provision of all required information, may result in a response or proposal being disqualified from further consideration. Kindly also refer to the detailed instructions in the main LRPS document.

Each valid proposal will be assessed by an evaluation panel first on its technical merits and subsequently on its price. For this RFPS, the weight allocated to the technical proposal is 70 % (i.e. 70 out of 100 points). To be further considered for the financial evaluation a minimum score of 49 points is required. Only proposals with a score of 49 or more points in the technical evaluation will be financially evaluated (i.e. the financial proposal will be opened). For further details and the distribution of points kindly refer to **table 1** below.

The weight allocated to the financial proposal is 30 % as per the following: the maximum number of 30 points will be allotted to the lowest technically compliant proposal. All other price proposals will receive points in inverse proportion to the lowest price. Commercial proposals should be submitted on an all-inclusive basis for providing the contracted deliverables as described in the TOR.

The proposal(s) obtaining the overall highest score after adding the points for the technical and financial evaluation is the proposal that offers best value for money and will be recommended for award of the contract.

Table 1: Evaluation Criteria and distribution of points

Technical evaluation criteria	Max. Points
1. OVERALL RESPONSE • Understanding of scope, objectives and completeness of response **(5)**	5
2. METHODOLOGY • Quality of proposed methodology and approach, and proposed implementation plan, i.e. how the bidder will undertake each task, and time-schedules **(15)**	15
3. PROPOSED TEAM and ORGANISATIONAL CAPACITY • Team members CVs - relevant experience, skills & competencies **(10)** • Local Presence in the region **(5)** • Bidder expertise, knowledge and experience as listed under the qualification requirements **(35)**	50
Total points for technical proposal (min. passing score = 49 points)	**70**
FINANCIAL PROPOSAL • Full marks are allocated to the lowest priced proposal. The financial score of the other proposals will be in inverse proportion to the lowest price.	30
TOTAL POINTS	**100**

9. Administrative issues

- Bidders are requested to provide their detailed technical proposal using **Annex C**. Additional attachments can be added to elaborate further on the assignment proposal and bidder/team qualifications. Please ensure that your proposal clearly outlines the compliance with all mandatory and desirable qualifications under paragraph 7 of this TOR, and includes all technical aspects which will be evaluated as per paragraph 8 - Table 1.

- Bidders are requested to provide a detailed cost proposal for each country in **Annex D** – Financial proposal response form.
- The bidder is requested to provide an all-inclusive cost in the financial proposal. The bidder is reminded to factor in all cost implications for the required service/assignment.
- The bidder is required to include the estimate cost of travel in the financial proposal – if applicable-noting that i) travel cost shall be calculated based on the most direct route and economy class travel, regardless of the length of travel and ii) costs for accommodation, meal and incidentals shall not exceed applicable daily subsistence allowance (DSA) rates, depending on the location, as promulgated by the International Civil Service Commission (https://icsc.un.org/).
- Unexpected travels shall be treated as above.
- For other potential countries including China, Vietnam, Sri Lanka and Bangladesh, a general daily rate can be provided. Please refer to Annex D
- A payment schedule will be proposed and agreed for each individual assignment under the TOR of each specific country. Payments must be based on completed deliverables.
- Payment terms 30 days net upon receipt of approved invoice.