

**Annex A: Terms of Reference
Korea/RFQ/PSP/2021/04**

**Request for quotation for F2F digital signup system implementation services for
UNHCR PSP Korea**

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1 Introduction

1.1 Background

UNHCR www.unhcr.org

UNHCR, the UN Refugee Agency, is the world's leading organization dedicated to saving lives, protecting rights and building a better future for refugees. UNHCR operates in the field in over 134 countries, using its expertise to protect and care for refugees, returnees, internally displaced people and stateless persons. UNHCR leads international action to protect people forced to flee their homes because of conflict and persecution. It delivers life-saving assistance like shelter, food and water.

Global refugee situation: Forced displacement, most of it arising from war and conflict, has risen sharply in the past decade, largely a result of the Syria crisis, but also due to a proliferation of new displacement situations and unresolved old ones. Some 70.8 million people are today forcibly displaced, of which 25.9 million are refugees. On 17 December 2018, the United Nations General Assembly affirmed the [Global Compact on Refugees](#). The Global Compact on Refugees provides a blueprint for governments, international organizations, and other stakeholders including the private sector to ensure that host communities get the support they need and that refugees can lead productive lives.

Private Sector Partnerships (PSP) service: UNHCR is almost entirely funded by voluntary contributions from governments and private donors. In the last decade, UNHCR has grown its private sector income from USD 34 million in 2007 to USD 537 million in 2020. This represents 10 percent of the total income and has been achieved through the financial support of more than two million individuals, most of whom give regular donations; and of companies, foundations and philanthropists partnering with UNHCR to deliver critical programmes and raise awareness of the refugee cause.

UNHCR started its Private Sector Partnership operation in Korea (hereinafter, PSP Korea) in 2009. As end of 2020, PSP Korea has over 230,000 monthly giving donors and partners recruited through various fundraising programs such as Face-to-Face (F2F), Digital, Direct Responses Television (DRTV), Multi-Channel, and Private Partnerships & Philanthropy (PPH). The primary role of PSP Korea is to coordinate and promote the relationship with the private sector in Korea and generate donation income through both regular giving and one-off giving to sustain UNHCR activities worldwide.

PSP Korea's Face-to-Face fundraising activity has been carried out since 2009. In 2021, more than 27,000 monthly giving donors are expected to be recruited via F2F fundraising program. With a view to improve the program's effectiveness and sustainability, PSP Korea is now seeking a web development agency that could develop and implement digital signup system for Face-to-Face fundraising activity.

1.2 Statement of Purpose & Objectives

UNHCR is seeking to enter into an agreement for development and implementation services of digital signup system for Face-to-Face fundraising activity in Korea with a vendor specialized in such service area. The main purposes of the service are as below:

- Improve donor retention, especially reduce pre-debit attrition
- Improve work efficiency of Face-to-Face fundraising campaigners
- Reduce risk of managing personal information by introducing digital pledge system instead of paper pledge form

UNHCR expects the delivery of below services of the vendor:

- The vendor plans and designs digital signup system for UNHCR's Face-to-Face fundraising activity in Korea
- The vendor develops digital signup system for both users (Face-to-Face fundraising campaigners) and administrators
- The vendor conducts QA (Quality Assurance) testing of digital signup system for launching of the system

- The vendor follows up the defects and issues for stabilization of the system and makes modification if needed
- The vendor provides necessary documents such as Service policy, Information Architecture, Guidelines, API specification, Design files, etc.
- The vendor prepared project communication tools

The required services are detailed in 2. Requirements.

Service Period

The service period starts from November 2021 for approximately 4-months period.

2 Requirements

This project must proceed in compliance with the following five requirements. The quality of the system is the top priority of this project. Plans may be coordinated through further discussions if modifications are needed to improve quality.

2.1 System Function Requirement

The digital signup system for face-to-face fundraising should provide following functions and should work on compatibly both on tablet and PC. The system should be implemented in compliance with web standards and web security.

Category	System page	Functions
User system	Login page	Login with a campaigner code (ID) and a password
	Campaigner landing page: Setting campaign information	Submit Campaign information: Campaign channel, Campaign code, Event/Region code, Signup location address, Location information etc
	New donation sign-up page: step-1) Donor & Payment information	Integrate with the sign-up page provided by donor management solution
	New donation sign-up page: step-2) Donation receipt & additional donor information	Integrate with the sign-up page provided by donor management solution
	Thank-you page	Display a thank you image and a thank you message Send a welcome message to the new donor
	Campaigner memo page: Adding additional donation/ donor information	Submit additional information of the donation and the donor (e.g. When a donation period needs to be set: submit start date and end date. When a campaigner needs to update campaign info: check the info and update)
	Donation campaign results page	View campaign results by period/by group depending on data accessing authorization (e.g. visualization report with graphs, data tables with the value of signup information, the average amount of donation, etc.)
	Campaigner information editing page	Modify campaigner information
Admin system	Login page	Login with an ID and a password
	Campaigner list page	View users(campaigners) Set/Reset user status, password (a single/plural users) Search users
	New campaigner registration page	Register a new campaigner as an user
	Existing campaigner information editing page	Modify existing campaigner's information (password, authorization, etc.)

	Donation campaign results page	Same functions as the functions [User system - Donation campaign results page] provides
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2.2 Digital Signup System Development

The agency should proceed the project in agreement with UNHCR Korea under the following process to develop the stable digital signup system.

1. Planning
 - A. For Needs assessment, UNHCR Korea's requirements should be clarified and what technical needs to be accomplished should be determined to implement the digital signup system. User policy and IA (Information Architecture) should be prepared.
 - B. For Project agreement, project schedules and milestones will be discussed with UNHCR Korea. Solutions that need to be integrated to the system and cloud instances for the system infrastructure must be configured before starting the development.
2. Design
 - A. For detailed planning and design proposal preparation, all clarified requirements should be applied to the planning and the fundamental design proposal should be provided.
 - B. For Planning and proposal confirmation, UNHCR Korea will review the detailed planning and the design proposal and make a confirmation with the agency. The agency should prepare detailed design proposal based on this confirmation.
 - C. For Sub-design confirmation, prepared sub-design proposals will be reviewed and confirmed by UNHCR Korea.
3. Development
 - A. For Front-end development,
4. Launch
 - A. For QA (Quality Assurance) testing conduction, first, the agency should conduct the internal QA testing. UNHCR Korea will proceed the QA testing with the version of pre-tested system.
 - B. For launching preparation, the agency should review the whole system and check with UNHCR Korea for the stable launch.
5. Post launch
 - A. After launching the system, system defects and issues should be followed up and solved as quickly as possible during the stabilization period. For the critical issues, system modifications should be reflected immediately as soon as it is ready.

2.3 Documentation

The following documents should be delivered during the project according to each progress step and the original package files by the end of project.

Deliverables	Requirement
Service policy	The document that defines all the policies regarding user service
IA (Information Architecture)	The document that sets structural design of shared information environments. This is like a sitemap that contains all page and popup structure with Screen id.
Basic Guideline	The document that defines UI/UX function rule that includes screen layout, system working flows etc.
Storyboard	The document that defines the functional elements of each

	page, sets an outline of the design approach, and shows the service flow.
ERD (Entity Relationship Diagram)	The document that shows a graphical representation of database entities and inter-relationship between entities.
API (Application Programming Interface) Specification	The document that defines input and output of APIs.
Design files	This is the package file that contains all original graphic files of the system.
Source code files	This is the package file that contains all original source code files of the system.

2.4 Project communication tools

The project communication tools which manage project tasks should be prepared and used for efficient communication and co-working with UNHCR Korea to share project progress and assignments.

2.5 Project Scenario

The Scenario of this document (preferred schedule) must be used as a reference; PSP Korea can adjust the figures provided hereinafter depending on the possible situations which might cause during the period.

Activities	Expected schedule
Planning	30 days
Designing	20 days
Implementation	60 days
QA by agency	5 days
QA by UNHCR Korea	5 days

3 Content of the offer and evaluation

Please make sure that you submit the necessary information to establish compliance with the below eligibility criteria. The evaluation will be based on a pass/fail (Yes or No) method. **Your proposal must be compliant with all the below listed:**

Criteria	Documents, information to be provided to establish compliance with the set criteria
System Functions: The digital signup system for face-to-face fundraising provides functions as per section 2.1 and should be implemented in compliance with web standards and web security.	The technical proposal outlines the compliance with all points listed under 2.1.
Digital signup system development: compliant with all requirements listed under 2.2 as for planning, design, development, launch and post launch.	The technical proposal outlines the compliance with all points listed under 2.2.
Documentation: documents as per section 2.3 are delivered during the project according to each progress step and the original package files by the end of project.	The technical proposal outlines the compliance with all points listed under 2.3.
Project communication tools: project communication tools which manage project tasks should be prepared and used for efficient communication and co-working with UNHCR Korea to share project progress and assignments.	The technical proposal includes an efficient project communication tool.
Project Scenario: proposal is in line with the proposed schedule.	The technical proposal confirms the schedule as per section 2.5.
At least two years of previous experience in the field of web development in Korea.	Please submit the company registration certificate and year funded.
At least one similar project executed.	Please include a debrief of the previous executed project, including the name of the client.
Account management	A brief CV of the proposed account managers is to be included to prove a skilled and experienced workforce to implement the system.

Your **financial proposal** is to be submitted on Annex B. No other format will be accepted. And unit rates will not increase over the course of the contract period. Please use a single currency (KRW) to provide your quotation.

UNHCR shall pay the vendor(s) within 30 days after satisfying completion of the service requested. Payment shall be made against the invoice and based on the quotation submitted by the vendor(s).

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).

Applicable General Conditions: Please indicate your acknowledgment of the UNHCR General Conditions of Contract for the Provision of Services (Annex D) and include the signed copy into your submitted Technical Proposal.

Applicable Special Data Protection Conditions: Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex E) and include the signed copy into your submitted Technical proposal.