



Annex A: Terms of Reference

RFQ/23/024/EUROPE/PSP

Request for quotation for fundraising data analysis support services for UNHCR PSP Europe Regional

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1 Introduction

1.1 Background

The United Nations Refugee Agency (UNHCR) is the world's leading organization in helping and protecting the millions of people forced to flee their homes because of violence, conflict, and persecution. We deliver life-saving assistance, including shelter, food and water while also safeguarding fundamental human rights, safety, and dignity.

UNHCR is almost entirely funded by voluntary contributions from governments and private donors. Private Sector Partnerships (PSP) Europe is one of the five regions of the PSP unit under the Division of External Relations, with the remit to increase awareness of UNHCR and raise funds from the private sector (individuals, corporates, foundations) in the region.

To manage private sector fundraising, PSP has committed to Salesforce as a platform using multiple instances (orgs) as the main donor CRM system for various offices around the world. Over the next few years, UNHCR will work with key system integrators to migrate other existing donor databases as well as set up new markets using Salesforce as the database of record to manage all individual giving, leadership giving/partnerships as well as digital donors relationships, income management, reporting etc.

In this context, PSP Europe is looking to recruit an experienced Fundraising Data Analyst to support European offices with advanced analysis, segmentations, prospecting, and overall fundraising reporting to further their marketing activities and income generation.

1.2 Statement of Purpose & Objectives

UNHCR Private Sector Partnerships (PSP) in Europe is seeking to appoint a qualified vendor for fundraising data analysis support services for regional scope.

The service provider must have proven experience in this area and must ensure the highest possible standard and deliver services within set deadlines.

1.3 Reference period

We are seeking to collaborate upon completion of this selection process, until end of December 2023, with potential extension until the end of 2024, subject to satisfactory performance. The service is needed min. 4 days per months max 7/8 days per months, for the period indicated.

2 Requirements

UNHCR Europe Region, is looking for an experienced data analyst service provider supporting European markets and Europe regional team on their data needs across IG and PPH.

The selected provider will support European offices with advanced analysis, segmentations, prospecting, and overall fundraising reporting to further their marketing activities and income generation.

Under the supervision of the Lead IG, the selected service provider will have the following responsibilities:

- Assisting the Assoc. Fundraising Data Analyst Officer (Europe) in a variety of data related projects
- Assist European markets with the set-up of data visualization tools to help provide real time and easy to read data insights.
- liaise with stakeholders in European markets and HQ to help define data briefs and improve the way to collect, interpret and use data.
- Help local team analyze performance of donor acquisition and
- retention activities and donor prospecting by creating reports and dashboards in Power BI;
- Provide support on data protection requirements, ensuring the processes are in-line with data regulations
- Help identify improvements in processes proactively and advise on actions
- Train new and existing users on system functionality.
- Stay current on all release notes and communicate any new features or changes to the team.
- Help develop and maintain documentation such as user guides, training materials and best practices

3 Content of the offer and evaluation

Please fill out Annex B as your Technical Response Form.

The evaluation will be based on a pass/failure (Yes or No) method. Your proposal must be in English and compliant with **all** the below listed criteria to be considered as compliant:

Criteria (pass or fail)	Documents, information to be provided to establish compliance with the set criteria
Your company is eligible to do business	<p>Submit registration certificate and fill out the vendor registration form (Annex F).</p> <p>In case your company is a registered PO-supplier for UNHCR (i.e., UNHCR has sent already purchase orders for local service provision or having a signed frame agreement in place), no need to submit company registration certificate and vendor registration form, unless any information has changed and needs to be updated.</p>
Compliance with UNHCR Special Data Protection Conditions	Please indicate your acknowledgement of the UNHCR Special Data Protection Conditions (Annex D) and include the signed copy into your submitted financial proposal.

Compliance with UNHCR General Conditions of Contract for the Provision of Services	Please indicate your acknowledgment of the UNHCR General Conditions of Contract for the Provision of Services (Annex E) and include the signed copy into your submitted Technical Proposal.
Relevant experience in data analysis in terms of projects	Please list at least two (2) data analysis projects you have carried out or are currently underway.
Number of clients in the non-profit sector	Please list at least three (3) clients, previous and current, in Europe non-profit landscape
Understanding of the Data Protection Act / GDPR and all relevant legislation in different European markets	Information and explanation are to be included into the technical proposal.
Experience with CRM database	Information and explanation are to be included into the technical proposal.
Experience in data visualization	Confirmation on professional usage of Power BI, Tableau, Qlikview and QlikSense.
Experience using quantitative data analysis software	Confirmation on professional usage of Excel proficiency required; Microsoft SQL, Visual Basic, R or Python

Please fill in Annex C for your price proposal.

Your financial proposal must be all-inclusive, meaning that no further cost will be absorbed by UNHCR in case of selection.

UNHCR is exempted from all direct taxes, with this regards the price must be given without any local taxes. Please use a single currency 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).

Please note that ad-hoc travel might be required within the region to meet counter partners at UNHCR PSP. The travel cost, including DSA and ticket (train or flight) will be covered by UNHCR.

The contract will be awarded for the technically compliant, lowest price proposal.