Terms of Reference for Institutional Contracts

1. Identification

**Description of the services:** LTA for provision of function development and server maintenance

**Expected start date:** 1 August 2023

**Expected completion date:** 1 August 2026 with a possible two-year extension

**Reporting to:** UNICEF China Partnerships & Innovation Manager

1. Background and objectives

UNICEF China is seeking professional function development agencies to provide services of designing and developing webpages and functions for all online fundraising, retention, E-shop, TM campaigns, and corporate activities.

UNICEF China has started digital channels to acquire and save donors since 2011. Through continuous testing and optimization, currently, the digital channel has become the main channel to recruit new supporters and save house donors. Increased online business requests and data procedures became the new challenges for UNICEF to grow. PI urgently needs to transform to business digitalization to adapt to the high customer volume and multiple business lines.

In line with digital acquisition, donor retention strategy, TM communication business, corporate activities plan and achieving increased targets, continuous functional development with high quality, efficiency and security protection are crucial.

In this respect, UNICEF is seeking to enter into Long Term Agreement with three functional development agencies. As it relies on functional development experts to deliver online fundraising, Eshop, and retention systems. Moreover, the previous donation system was established in 2011, which was 10+ years ago, and it did not anticipate the huge amount of donors nowadays, and the architecture was old and cannot scale up. A new donation system needs to be constructed and fit for the needs with refurbished technical architecture and flexible scalability. Considering the complex logic of PI business systems, the time-consuming nature, and the large volume of requirements, it is necessary to introduce multiple agencies to share the different project development needs to meet the urgency of multi-project development at the same time.

1. Scope of Work

Functional development agencies are required to manage the detailed requirement acquisition, system and pages design, server configuration, key system architecture design, function development, function testing, system maintenance, and system online of digital marketing campaigns, retention service activities, TM communication businesses and corporate activities from generating the online functional system to support PI team’s work.

UNICEF expects that the agency proactively collects and figures out all related functional requirements to complete the development tasks either as directed by UNICEF or independently through various mechanisms, such as researching online and offline.

The LTA is required to carry out the tasks listed below as needed by UNICEF

* 1. Creative works

Design and production of HTML based webpage (such as landing page and email page) and donation page, in both desktop and mobile versions;

* All creatives’ look and feel should follow the official UNICEF China site and overall design guidelines.
* All raw materials (text, video, photographs) will be supplied by UNICEF China.
* Install media tracking code and other digital tool codes for performance analysis
  1. Coding/functional development for desktop and mobile website
* Provide specific functional development requirements according to UNICEF’s request and vendor’s analysis.
* Provide database design, development language suggestions, database software/server configuration/system architecture guideline
* Business-related function development which mainly includes areas below:
* Messenger sending related function development: should cover integrations with all third-party SMS,5G messages, rich media messages, EDM, WeChat messages’ group, and one-to-one single sending function
* Donation funnel and management-related function development:

Based on the refactoring of the existing CMS system, we enable an advanced and stable system framework, more friendly and smooth page interaction, and a more reasonable data structure to help optimize the existing business.

-Payment gateway function integration (Alipay, WeChat, Bank pay, etc).

-Donation campaign tracking, identifying, and management function

-Donation funnel development

-Different types of donation orders management function

-Multiple templates and data imports & exports function

-Integrated with third-party systems for data transformation

-Data filter, cleaning, report, and dashboard function

-System security management-related function

-Media tracking code installation and management

- Appreciate wall function

-Landing page development

* Data distribution automation function development:

-Integration with third-party data centre system to accomplish efficient API data transformation

-Customized filter and data distribution rule generation

-Multiple data distribution campaign management

-Data filter, classifying, and report dashboard function

* WeChat-related function development

-Based on the WeChat eco-environment (WeChat public account, WeChat mini programme), develop WeChat messages edit, sending function

-WeChat user management function

-WeChat user interaction-related function

* Donor portal centre function development

-Donor donation, purchase records save and searching function

-Donor info management and classifying

-Donor login, signup function

-Webpage design and development including interaction

-Content management and launch function

-Online incentives, promotions activities function

-Donor behavior monitoring and management function

-API integration with other third-party systems

* Shop-related function development including but not limited to

-shop website design, purchase flow development

-User login, signup function

-User info management and tagging

-order transaction management

-logistics-related function management

-Data filter, report, analysis, and dashboard-generating function

-Product sale management function

-Warehouse-related function

-Third-party e-commerce platform (like Taobao, JingDong, Douyin) integrated function

* CRM and Datacenter related function development:

-Donor service journey generation function

-Individual, corporator info from all channels management and segment

-All donations, purchasing, leads records save and management function

-Retention/TM-related logistics, contact campaigns’ management function

-Import/Export

-SBRM module development function

-receipt report, finance-related function

-Filter function for data report

-high-speed searching

-log records

-data backup automation

-standard API development

-Data analysis and dashboard-related function

-DPO integration with third-party system

-System table and properties management

-Calculation automation function

* Data analysis related to function development

-use cutting-edge technologies such as artificial intelligence, big data to help do business analysis, predictive models

-generate friendly dashboards to help visualization key problem

-technology implementation for all UNICEF data insight strategies and methods

-all channels’ performance tracking data collection function

* 1. Server and system maintenance
* General function bug fix
* Setup automatic backup on the servers
* Regular maintenance to guarantee availability and acceptable user performance experience
* Configure server environment for application deployment
  + Server Security Enforcement
  + Patch server viabilities
  + Virus scanning and clean-up
  + Troubleshoot server issues and provide solutions to fix them. Provide a helpdesk support process and an escalation mechanism.
* Monitoring and Backup service
  + Monitor application status and server resources
  + Ensure critical data is backed up regularly
  + Disaster recovery readiness maintained
* Data security and protection
  + Regular security attack
  + Provide appropriate server configuration and server security service recommendation
  + Provide regular server performance reports

- Emergency

* + In case of a security attack, such as DDOS/CC attack, help analyze the situation and provide solutions to UNICEF on how to deal with the attack. Perform and apply remediation measures to application software and hosting environment as needed. Notify UNICEF within 30 minutes.

- Customer Service: 7x 24H customer service

* + With proposed support levels for different levels of escalation and priority
  1. Project management service
* Provide dedicated project managers as the focal point to conduct all communication work
* Essential technical research service to generate the proper proposal
* Overall functional project management includes requirement researching, risk and equality control of projects, prototype generation, project follow-up, phase project progress report, cross-team coordination, project delivery, specific timeline provide and implementation, project test and launch, projects-related document generating
* Project manager will ensure that the capacity, resource allocation, and development follow the agreed plan, and coordinate with UNICEF timely for any issues that need clarification.
* Reasonable man-days cost evaluation confirmed by UNICEF
* Provide high-level efficient project communication mechanisms and projects management methods
* Provide online training and also the system user manual for UNICEF staff on all developed functions.
* Coordinate Quality Assurance (QA)/test before presenting to UNICEF, try to reduce most of the bugs, and ensure the production version function’s stability running after the launch
* Provide development documents for each task (database structure, installation guide, development/coding document, system design documentation, system infrastructure description, user manual, etc.)
  1. Third-party technical products research and introduce implementation

In terms of special technical areas like A/B testing, big data analysis platforms, Order Management System(OMS), Warehouse Management System(WMS), security-related productions, etc, there are already stable system products in the existing market that can directly or require only minor modifications to meet UNICEF's needs. The vendor could outsource other third-party companies to work and deliver the project result.

- Do the related product research and involve UNICEF in the bidding and comparison process.

- UNICEF have the final approval authority for the products’ procurement.

- The vendor should have full understand of UNICEF request and security standard, and control the third-party products’ security and features’ availability.

- Be responsible for the system function implementation and system integration.

* 1. Technical specialist consulting service
* Provide professional technical support to address technical difficulties like high concurrency, high volume computing, search optimization
* Provide constructive suggestions in database selection, system architecture development, data structure development, server architecture construction, security service configuration, and other technical-related production
* Provide digital transformation solution that adapts to UNICEF’s business development
  1. System Security and protection

- Provide appropriate system security implementation solutions and budgets.

- Jointly with UNICEF ICT to complete the implementation of the security solution.

- All functional work should be monitored and reported to UNICEF ICT, and once the system and server launch successfully, transfer the top management authority to UNICEF ICT for subsequent authority management.

- All personnel involved in the UNICEF projects should sign the Non-disclosure and confidentiality agreement(NDA) with UNICEF.

- The vendor should have function development and data protection-related security qualification certificates.

1. Deliverables and payment schedule
   1. Deliverables:

* Provide a detailed timeline of each project including functional design, prototype, development, testing, online, and training.
* Provide full-stage communication records and meeting minutes.
* Provide comprehensive requirements document for each task.
* Functional development tasks are completed accurately and in a timely manner.
* Provide specific functions using guidelines, database structure, installation guide, development/coding document, system design documentation, and system infrastructure description.
* Provide final design source files for creative and design tasks.
* Provide text-based solutions and also face-to-face presentations for consulting tasks.
* All personnel from vendor involved in the use of UNICEF data, provide their NDAs within the official seal.
  1. Payment Schedule:

Invoices are paid on the actual assignment completed. Normally UNICEF pays the services and products upon satisfactory completion of delivery and submission of invoice.

Payment Term:

Purchase Order will be issued under the Long Term Agreement with clear deliverables. Upon satisfactory completion, UNICEF will pay the Contractor within 30 days of the date of submission of the invoice.

1. Qualification requirements

* Legally registered Firm with at least two years of experience in the area of functional designing and development.
* Strong competency to independently manage the entire functional development project.
* Knowledge of English: understand a written brief in English and be able to communicate in English, and back-translate documents into English.
* The contractor should have the in-house capacity to undertake most of the tasks under this LTA. Only when certain specific tasks go beyond its business scope it can sub-contract other third-party companies to work and deliver the project result.
* Experience in similar-level projects conduction.
* Efficient project management mechanism
* Perfect data security protection mechanism
* Certification in development capabilities and data security

1. Evaluation criteria

The evaluation procedure will focus on both technical proposal, proposal presentation and financial suitability. The weights of 50%, 30% and 20% shall be applied for technical proposal, proposal presentation and financial compliance respectively.

Only firms scoring at least 70% of the maximum score during technical proposal evaluation will be considered for presentation. Only firms scoring at least 70% of both technical proposal evaluation and proposal presentation will be considered for financial compliance.

**Technical Evaluation Criteria**

1. Overall response - 5 points

1.1 Completeness of response, overall concord between RFP requirements and proposal – 5 points

2. Proposed Methodology and approach – 20 points

2.1 Relevance and quality of proposed methodology, include system architecture design, database selection, system security specification setting and other aspects of system development related – 15 points

2.2 Project timelines and work plan(include security methods implementation) – 5 points

3. Experience and qualifications of firm and key personnel – 25 points

3.1. Company profile (establishment, facilities, financial capacity, personnel, main business, advantages) – 5 points

3.2 Core technical specialist and project manager experience and resume -5 points

3.3 Experience in similar projects, covers aspects of — 10 points

3.4. Relevance of qualifications & expertise of proposed team of consultants – 5 points

Total technical: 50 points

**Technical** **Proposal Presentation Evaluation Criteria**

Experience in similar projects( mainly involved in integrated multi-channel payment system development, big data processing and analysis platform development, user center platform), covers aspects of — 30 points

1. key function and technology introduction

2. full process project management

3. security protection methods and norm

4. core advantage introduction

Total technical Proposal Presentation: 30 points

Based on the total score ranking results, the top two or three vendors need to be recruited. The specific reasons are as following:

* As technical proposal evaluation should be done by the 6 aspects mentioned in the scope of work. The 6 aspects are very different and cover a broad service range, it might happen that all 6 scopes cannot be implemented by only one contractor at the same time.
* Also from business perspective, we have digital ecommerce, telemarketing, retention, digital acquisition various industry areas. Each team has different type of functional development request. One contractor is hard to meet all different types of requests and have same advantage in multiple business areas.
* According to the previous experience and current business volume, every year we will have about 20 development projects to do, among which there are about 7 projects with a development duration of 3 to 6 months. One contractor is not enough to complete so many development tasks. Also considering the difficulty of portability of system development, we need multiple LTA holders to share these development tasks
* With multiple LTA holders, we could ensure there is always a technical talent backup. Once one of contractors has problem, we could control the risk of no technical support which leads to the system failure.

In the cooperation with the multiple vendors, we will assign development tasks based on UNICEF’s business type needs, combined with vendors’ development experience and strength. The similar and high-related business needs will be assigned to one vendor and another type of business needs will be assigned to other vendors. More specifically, we need one vendor mainly focus on acquisition and retention business development, the one on TM and ecommerce business development.

In addition, the number and size of each business project is various, so we need both the small and the large vendors of different sizes to complement each other. The larger one manages the super complex development projects, research and high-level technical specialist consulting service. The smaller one provides medium-size projects development with more flexible response.

1. Content of technical proposal

# Structure of the Technical Proposal

The Technical Proposal should include but not be limited to the following:

* Corporate Profile highlighting the bidder’s qualifications and experience in implementing the assignment, please include details of specific experience with similar assignments in the past five years.
* Detailed understanding of UNICEF’s requirements for this assignment and bidder’s value proposition
* Detailed Methodology/approach to a project demonstrating how you meet or exceed UNICEF requirements for this assignment
* Proposed timeline
* Bidders are requested to back up their submissions by providing:
  + Evidence in the form of job completion certificate, contracts and/or references.
  + Three case studies containing the following information:
    - Name of Client
    - Title of the Project
    - Year and duration of the project
    - Scope of the Projects/Requirements
    - Proposed Solutions and Outcome – include visuals, web links, etc.
    - Team members on each of the projects and their specific roles
    - Project timelines (start and end date year, and any other information necessary)
    - Reference /Contact person details
* Details of the Proposed Team for the assignment including the following information:
  + Title/Designation of each team member on the project
  + Educational qualifications and professional experiences
  + Past experience in working on similar projects and assignments – List all similar projects they worked on and their roles on those projects.
* Project implementation and work plan showing the detailed sequence and timeline for each activity and days necessary for each proposed team member
* Quality assurance mechanisms and risk mitigation measures put in place

**Technical Proposal Presentation:**

One-hour online/offline proposal presentation is required, offline presentation is preferred. The presentation should include but not be limited to the following:

* Bidder to do an explanation of their bidding document to demonstrate their qualifications and skills.
* Project involves management service so we would like the bidder’s project manager to participate in the bidding document explaining the process.
* We will raise some questions during the presentation, so bidders are expected to provide information to support us for the better understanding of their ability.

The Price Proposal shall include, but not limited to, the following:

The format shown on the following pages should be used in preparing the price schedule. The format includes specific expenditures, which may or may not be required or applicable but are indicated to serve as examples.

|  |  |  |  |
| --- | --- | --- | --- |
| **Price Schedule** | | | |
| **Description of Activity/Item** | | **Unit Rate**  **RMB** | **remarks if any** |
| **1.** | Management of project development |  |  |
| **2.** | Design of webpages and systems |  |  |
| **3** | Development of specific function and pages |  |  |
| **4** | Testing of all function interact |  |  |
| **5** | Training and related documents providence |  |  |
| **6** | Production Support & Maintenance |  | Monthly or Annual basis; |

**\*Continue separately as necessary**

1. Award Criteria

Further to para 6 above, the following methodology will be used for evaluation of price proposals and contract award. Only price proposals of the technically responsive Offerors will be opened and evaluated.

The price should be broken down for each component of the proposed work. The total amount of points allocated for the price component is 20. The maximum number of points will be allotted to the lowest price proposal that is opened and compared among those invited firms/institutions which obtain the threshold points in the evaluation of the technical component. All other price proposals will receive points in inverse proportion to the lowest price; e.g.:

20 \* Price of lowest priced proposal

Score for price proposal *X* = --------------------------------------------------

Price of proposal *X*

All prices/rates quoted must be exclusive of all taxes as UNICEF is a tax-exempt organization.

The proposal obtaining the overall highest score after adding the scores for the technical and financial proposals is the proposal that offers best value for money.

UNICEF will award the contract to the vendor whose response is of high quality, clear and meets the project goals. The price/cost of each of the technically compliant proposals shall be considered only upon evaluation of the above technical criteria.