



Annex A: Terms of Reference

RFQ/25/004/EUROPE/PSP

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

Table of Contents

Contents

1 Introduction	3
1.1 Background	3
1.2 Statement of Purpose & Objectives.....	3
1.3 Reference period	3
2 Requirements	4
3 Content of the offer and evaluation.....	4

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 for one year, with the possibility to further extend the contract for another one year, subject to satisfactory performance. The service is needed min. 4 days per months max 7/8 days per month, 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
Compliance with UNHCR general terms and conditions	Accept UNHCR general terms and conditions (Annex D). Please confirm your acceptance at Annex B.
Compliance with UN Supplier Code of Conduct	Accept UN Supplier Code of Conduct (Annex E). Please confirm your acceptance at Annex B.
Compliance with data protection	Acknowledge the Supplementary Agreement on protection of personal data (Annex F). This agreement will be discussed and adjusted to the project requirements with the winning company. Please confirm the acknowledgement at Annex B.
Relevant experience in data analysis projects	Your company must demonstrate at least two (2) data analysis projects carried out or are currently underway. Please list these projects with their start & end date (if any) on the technical response form (Annex B).

Number of clients in the non-profit sector	Your company must have at least three (3) clients, previous and current, in the non-profit landscape. Please list these clients on the technical response form (Annex B).
Experience with CRM database	Your company must demonstrate experience in working on the CRM (Customer Relationship Management) system. Please describe at least one project focusing on CRM on the technical response form (Annex B).
Experience in data visualization	Your company must demonstrate experience in Power BI, Tableau, Qlikview and QlikSense. Please describe at least one project using Power BI, Tableau, Qlikview and QlikSense on the technical response form (Annex B).
Experience using quantitative data analysis software	Your company must demonstrate experience in Excel proficiency required, Microsoft SQL, Visual Basic, R or Python. Please describe at least one project using Microsoft SQL, Visual Basic, R or Python on the technical response form (Annex B).

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 the event of selection.

UNHCR is exempt from all direct taxes, with this regard 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.