

Terms of Reference for Institutional Contracts

1. Identification

Description of the services:	LTA for email platform Agency
Expected start date:	31 May 2022
Expected completion date:	30 May 2027
Reporting to:	UNICEF China Partnerships & Innovation Manager

2. Background and objectives

UNICEF China regularly sends emails to supporters and IG shop buyers for supporter care. e-receipts are also sent through email to improve supporter's loyalty and increase satisfaction.

3. Scope of Work

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

1. Email platform

- Open UNICEF account for UNICEF members to operate easily
- Support platform for creating and sending large number of personalized and dynamic emails promptly
- Automatic distribution of emails, based on a scheduled plan and customized needs
- Provide function to automatically send birthday emails, based on an uploaded birthday list. (some vendors call it Trigger function)
- Provide API interface to UNICEF, so UNICEF web applications can call the API and send email.
- Provide function development service for the customized needs to conduct better supporter care
- Add sender to whitelist of all international email providers (Hotmail, gmail, msn, etc.) and domestic email providers (Netease, qq.com, etc.). Make sure email don't fall into junk box
- Output email results by log format
- Estimated email quantity for the next 5 years to be around 236.5 million

2. E-receipt module platform

- UNICEF can upload supporter information with their consent to the platform (excel or csv)
- Three sets of receipt email templates — regular one off, annual pledge and regular IG buyer who wish to get receipt.
- Provide function development service for the customized needs to conduct better supporter care
- Platform can create e-receipt JPG file for each supporter based on UNICEF template
- Module can send email to each supporter with the attached e-receipt
- UNICEF staff can easily find and resend the e-receipt JPG file to a particular supporter
- UNICEF staff can download one or whole e-receipt JPG file

3. Security and aftersales services:

- Ensure data confidentiality. The contractor undertakes not to use data for any other purpose other than to process the service in this contract

- Provide on the spot training for operating the platform
- Generate tracking reports and history record
- Ensure the email distribution channel is working properly and with high quality on daily basis
- Provide customer service, online/telephone/email within 24hours.
- Provide advice and concept for email creation and campaigns (not mandatory, nice to have)
- Support to optimize database for more successful delivery and better supporter care

4. Deliverables and payment schedule

Deliverables:

- Subject to support platform for UNICEF daily use on email blasting and e-receipt auto sending, deposit 47.3 M pieces of email delivery quantity for each year.
- Manage the entire function development services based on UNICEF's requirements and needs
- Implement the function development services according to mutually agreed schedule.

PAYMENT SCHEDULE:

Expected LTA Term: 5-year period: 3-year expected plus 2-years (extended based on actual requirements)
(Above can be increased depending on requirements)

Final payment schedule will be based on the financial proposal from the successful firm, on the understanding that payments will be against deliverables as outlined above. No advance payments will be entertained by UNICEF.

5. Qualification requirements

- Proven track-record in planning and implementing similar tasks in China.
- Outstanding security record. The contractor undertakes that the data used by the platform will be secure and that it takes all measures to ensure that data is secured and protected.
- Experienced agency with good relationship with major email providers.
- Contractor should have strong experience on developing and implementing email automation function based on the actual future requirement of UNICEF.
- Contractor should have strong experience on developing and implementing email integration function based on the actual future requirement of UNICEF.
- Track record in ground-breaking, effective work.
- Experience of working with not-for-profit organization is a must-have.
- Contractor should ensure the confidentiality and security of the data and not share with any other party for any other purpose.

6. Evaluation criteria

The evaluation procedure will focus on both technical and financial suitability. The weights of 70% and 30% shall be applied for technical and financial compliance respectively.

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

Technical Evaluation Criteria

1. Overall response - 10 points
 - 1.1 Completeness of response — 5 points
 - 1.2 Overall concord between RFP requirements and proposal — 5 points
2. Proposed Methodology and approach — 10 points
 - 2.1 Relevance and quality of proposed methodology — 5 points
 - 2.2 Project timelines and workplan — 5 points
3. Experience and qualifications of firm and key personnel — 50 points
 - 3.1. Company profile (establishment, facilities, personnel, financial capacity — 5 points
 - 3.2 Experience in similar projects, i. e. developing and implementing email automation function / developing and implementing email integration function / developing and implementing email sending with attached auto personal designed file function — 40 points
 - 3.3. Relevance of qualifications & expertise of proposed team of consultants — 5 points

Total technical: 70 points

7. Content of technical proposal

Structure of the Technical Proposal

The Technical Proposal should include but not 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 bidders value proposition
- Detailed Methodology/approach to project demonstrating how you meet or exceed UNICEF requirements for this assignment
- Proposed timeline and milestones
- Project dependences and assumptions
- Bidders are requested to back up their submissions by providing:
 - 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 project 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
 - Previous experience in working on similar project and assignment – 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 mechanism and risk mitigation measures put in place

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
Email delivery fee (RMB) of quantity of 0.12637 Billion pieces		
EMAIL BLASTING PLATFORM:		
Auto sending emails		
Trigger module		
API module license fee		
Whitelist emails for all international and domestic email Provider		
ERECEIPT MODULE DEVELOPMENT		
Donor info upload		
Creating e-receipt		
Sending e-receipt		
Locating and resending e-receipt		
Download e-receipt		
Others not included in above, please clarify.		

***Continue separately as necessary**

8. 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 30. 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.:

$$\text{Score for price proposal } X = \frac{30 * \text{Price of lowest priced proposal}}{\text{Price of proposal } X}$$

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.