

ANNEX B

TERMS OF REFERENCE FOR INSTITUTIONAL SERVICES

Long Term Arrangement for the Maintenance, Enhancement Development, and Market Support of Global Giving Platform 2 (GGP2)

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1. Background

The UNICEF Division of Private Fundraising and Partnership (PFP) is refactoring its online donation platform, called Global Giving Platform (GGP) 2 as a reference to the existing one GGP1 and GGPx, in order to address the different issues with the current platform (e.g. performance, personalized content, time to market, etc.), but also to develop new capabilities as per the ambitions to upgrade donor digital experience, boost conversion, and ultimately increase revenue for all UNICEF markets.

Currently, the UNICEF network uses of fundraising offices use multiple donation websites, usually managed directly by each office with a variety of locally sourced vendors. This is a fragmented operation that allows for great agility and customization. However, this setup creates inconsistency in quality of technical infrastructure and does not offer the advantages of economies of scale and dilutes the UNICEF brand.

In the past UNICEF has developed shared platforms:

1. GGP1: launched in 2018, this is a Drupal-based platform created to provide digital fundraising over multiple countries not served by a local UNICEF fundraising office. It expanded to support the needs of some markets, such as Brazil and Mexico.
2. GGPx: based on GGP1, this platform was created to support a mix of markets with independent autonomous codebases (GGPx).

The long-term goal for the GGP2 is to support as many markets that request to use it as their main shared fundraising platform. The expectation is to have at least 15 country offices and regional hubs using the new platform as the infrastructure of their fundraising efforts until 2029. More offices may be included, depending on team capacity as well as the system's performance and effectiveness in generating revenue.

Given the complexity of the fundraising features and the need for flexible and scalable platform, the GGP2 is conceptualized around a set of packaged business capabilities (PBCs) made of composable elements and using modular and API-first approaches:

- **Optimizely Content Management System (CMS) and Commerce Connect:** these two products from Optimizely One Platform are at the core of the GGP2 as a multi-site, multilingual and multi-currencies donation platform.

- UNICEF Philippines launched in September 2026. The next markets currently being onboarded onto the system are Thailand and Uruguay. The architecture hosting these markets would constitute the baseline for the future work to be performed in this LTA
- The platform will be required to integrate with multiple systems, the main ones being Payment Service Providers (PSPs), Salesforce CRM and others as needed.

2. Purpose and Objectives of the Contract

UNICEF aims to enter into Long-Term Arrangements (LTAs) with qualified implementing partners (IPs) for the procurement of services related to the maintenance of the core component, development of enhancement as new markets are onboarded, support markets, and introduce relevant capabilities as Optimizely adds more features to bring GGP2 to the next level, throughout the duration of the LTA.

With strategic guidance and products direction from Optimizely, UNICEF will engage in a tripartite collaboration with a qualified implementing partner(s) to build the GGP2, a digital fundraising solution based on website, e-commerce and mobile app using Optimizely CMS and Commerce Connect initially.

- **Strategic objectives** – GGP2 will be the new global digital giving platform that inspires people to give, with the vision to become the most trusted and donor-centered online donations platform for UNICEF. It aims to upgrade donor experience, boost conversion, and ultimately increase revenue for all UNICEF markets.
- **Technical objectives** – the design and architecture of GGP2 rely on fostering innovation, flexibility and scalability optimized for better performance and lasting impacts. GGP2 will comply with international standards and best practices on security (i.e. PCI) and data privacy (i.e. GDPR and others) as well as system integrations. The Class I System of UNICEF Security Requirements is available in Appendix 4.
- **Operational objectives** – GGP2.0 will empower fundraisers by simplifying content editing and reviewing and, by using reusable components, enable fundraisers to assemble pages and create content without code (or reduced dependency on developers), accelerating delivery time to market while remaining brand compliant.

Tentative list of markets and related integration requirements is presented in Appendix 2. UNICEF anticipates a phased onboarding of markets over the duration of the LTA. The onboarding sequence below is indicative only and remains subject to ongoing discussions and confirmation with participating markets:

- Year 1: India, Indonesia, Brazil, ECA Cluster, Virtual Hub
- Year 2: Colombia, Ecuador, Chile, Serbia, Malaysia
- Year 3: Mexico, Bulgaria, Romania, Croatia, WCA Cluster

The above roadmap is intended to provide bidders with an indicative view of the anticipated implementation scale and timeline. UNICEF reserves the right to adjust the onboarding sequence, timing, and participating markets based on operational requirements and market readiness.

Given the multi-market nature of the programme, vendors are expected to demonstrate their experience and proposed methodology for planning and delivering large-scale multi-sites (markets) implementation. Proposals should describe how markets may be grouped and onboarded efficiently based on relevant factors such as common payment service providers (PSPs), language requirements, geographic proximity, regulatory environments, or other implementation considerations. Vendors should provide an indicative implementation approach, including resource planning, governance structure, risk management, and strategies to maximize efficiencies across multiple market deployments while ensuring a consistent and high-quality delivery model.

3. Work Assignments/TOR

The IP will provide end-to-end service as well as resources to support through every stage of the project, from strategy and planning, to requirements analysis and design, to development and testing, and ongoing maintenance and optimization.

The IP will provide:

- **Strategic consulting:** review client business goals, provide expert advice, and develop a mutually agreeable roadmap, design, and implementation plan.
- **Project Management:** agree with product owner on project plan, priorities, milestones, documentation, KPIs and reports.
- **Governance:** support and engage with multiple offices and stakeholders to co-lead the technical governance processes (i.e. voting on feature priority list) to establish common standards including for a shared roadmap of onboarding and improvements, testing and optimization as well as shared knowledge and training.
- **Configuration:** for requirement that **fully supported by the base product** but require **setting of attributes using tools** (e.g. user interface, configuration files, command line etc.) within the product base as part of standard setting. The IP is expected to leverage the native out-of-the-box elements of Optimizely as much as possible.
- **Customization:** for requirement that is **fully or partially supported by the base product** and **requires new/change of attributes, rules, logic or process of the base product** in order to meet specific business objectives and requirements. The IP is expected to leverage and extend the native out-of-the-box elements of Optimizely as much as possible, and use upgrade-friendly patterns, such as standard dependency injections and Optimizely-based modules, to ensure that future Optimizely platform upgrades do not break the custom code.
- **Development:** for requirement that **is not supported by the base product** and requires the **use of coding, tools or methods to create new/enhancement of functionality or integration** with other systems (e.g. multiple instances of Salesforce NPSP, Payment Gateways, Analytics & BI platforms, ...) in order to meet specific business objectives and

requirements. The IP is expected to leverage and extend the native out-of-the-box elements of Optimizely as much as possible, and use upgrade-friendly patterns, such as standard dependency injections and Optimizely-based modules, to ensure that future Optimizely platform upgrades do not break the custom code.

- **Alternative solution:** third party add-ons or apps is proposed to compensate the gap in the base product. Such solution would be assessed and approved by UNICEF prior to implementation.
- **Maintenance support:** agree with product owner on operational and maintenance support models, as well as resources

Scope of Work

UNICEF is undertaking a multi-market transformation of its digital fundraising capabilities through the Global Giving Platform (GGP) 2.0 initiative. This GGP2 platform is intended to serve as a scalable, secure, and user-centered fundraising website to support online donations, donor journeys, and integrations with UNICEF's internal systems and global/local service providers.

The selected partner(s) will provide comprehensive product development services to support the maintenance and evolution of GGP 2.0. This includes:

- End-to-end development of fundraising platform features across frontend, backend, and integrations.
- Support for Agile delivery workflows, sprint-based planning, and backlog management.
- Design, maintenance, and optimization of user experience (UX) and user interface (UI) components.
- Support for governance processes, including shared roadmap and common development processes across multiple offices and teams.
- Continuous system integration with payment providers, CRMs (e.g., Salesforce), and analytics platforms.
- Understanding of front-end open design system management and implementation.
- Expertise in implementation of UX / UI design solutions.
- Support for advanced data analytics implementation and optimization.
- Integration of multiple payment providers, methods and related solutions (i.e. tokenization systems and others) for each office.
- Work with each individual office to understand requirements and how they fit or not the GGP2 standards.
- Implementation of AI backend solutions (i.e. Optimizely Opal).
- Data migration, if relevant, from old system and support in sunsetting the current platform.
- Support functions such as documentation, training, QA/testing, direct user support, ticketing system management, and incident management.
- Full alignment with UNICEF's internal governance, security, accessibility, and privacy standards.

In addition to the existing pilot markets, GGP2 would be expanded to 10 to 15 markets and 6 Clusters (entities grouping small markets) in the first 3 years. A list of markets and related integration requirements (e.g. Salesforce, Payment Service Providers, etc) is provided in Appendix 2.

The expansion will be developed in close collaboration with UNICEF's internal Product Manager, Technical Owner, business and technical analysts and market focal points, following Agile product development methodologies.

4. Work Assignments/TOR

1. Platform Development & Maintenance

- Review, improve, and maintain the core foundation of GGP2.0 as a single standard followed by all participating offices.
- Onboard markets by leveraging native features, common features and developing specific market features
- Build and deliver new capabilities as Optimizely introduce new features, and in line with product roadmap.
- Continuously develop core foundation towards maintainable GGP 2.0 with the goal of performance and scalability.
- Ensure all code meets UNICEF's internal governance, security, and accessibility standards.
- A statement of work will be agreed with implementing partner(s) to define the scope, deliverables, timeline, milestones, and acceptance criteria as well as cost for development and maintenance work.
- Offer specific support and development for AI-driven projects in general (both within the CMS and other related systems), including implementation of specialized agents, as well as AI-driven coding and other use cases as needed.

2. Agile Delivery & DevOps Participation

- Actively contribute and, as needed, lead Agile ceremonies and sprint planning using multiple project management tools (i.e. Jira, Microsoft DevOps etc).
- Create, refine, and manage user stories, tasks, and test cases.
- Participate in sprint demos, retrospectives, and velocity tracking per agreed cadence.

3. UX/UI Design & User Experience

- Support the GGP2 design system as standard components and UI templates.
- Deliver responsive and accessible UX improvements across devices and markets.
- Support regular UX testing based on donor/admin feedback and analytics.

4. User Research & Human-Centered Design

- Support user research and usability testing with donors and market admins.
- Maintain user personas and donor journey maps for different market profiles.
- Deliver research summaries and UX improvement recommendations.

5. System Integrations

- Single-sign-on using Azure Entra-ID
- Develop and maintain APIs with payment orchestrator (e.g. Spreedly) payment gateways (Stripe, Checkout, Nuvei, Xendit, 2P2C, etc.), CRM (e.g. Salesforce NPSP), and analytics

platforms (Google solutions). Tentative list of third-party systems for integration is provided in Appendix 3.

- Ensure real-time, secure data exchange with internal middleware and external services.
- Document and monitor all integrations for stability and traceability.

6. Product Roadmap & Backlog Management

- Maintain and update the product roadmap in coordination with participating UNICEF offices as part of shared governance processes.
- Develop commonly agreed backlog items based on value, effort, and dependencies.
- Align roadmap with stakeholders, multi-market needs, regulatory changes, and platform evolution.

7. Quality Assurance & Testing

- Create and execute manual and automated test cases for all key features.
- Conduct regression, performance, and cross-market testing pre-release.
- Track bugs and resolution cycles with clear test result documentation.

8. Project Management & Reporting

- Maintain up-to-date calendars, timelines, and sprint boards.
- Report regularly on sprint progress, performance metrics, and delivery risks.
- Coordinate cross-functional delivery, ensuring on-time, in-scope execution.

9. Training, Support & Documentation

- Deliver technical, admin, and user documentation for all platform areas.
- Documentation and training materials shall be developed using accessible and inclusive practices and designed to facilitate knowledge transfer and long-term maintainability of the solution.
- Conduct remote live training sessions and onboarding workshops across time zones.
- Provide digital training materials in English (videos, guides, FAQs) for self-paced learning.
- Respond to and help manage technical support tickets and related systems as needed.

10. Security, Privacy & Compliance

- Implement platform features with security-by-design and data protection principles.
- Comply with UNICEF and international standards (e.g., PCI, GDPR) for privacy and access control.
- Run regular vulnerability scans, access reviews, and incident readiness exercises.

11. Operational and Maintenance support

- Provide hyper care support to onboarded markets: once a release is made (e.g. market goes live), the implementing partner(s) provides dedicated support to ensure smooth transition and stabilize the system. Support is provided remotely by agreed means of communication.
- Provide steady state support to all markets: once the release is stabilized, the internal resources will manage the day-to-day operations and troubleshooting issues (Level 1 & 2) and escalate to the implementing partner(s) for problems that cannot be resolved by the internal resources (Level 3). Support is provided remotely by agreed means of communication
- Coordinate the maintenance and enhancement support with internal resources: the long-term support model will be similar to the steady-state support but the escalation to implementing partner(s) will be based on demand using statement of work with pre-agreed scope, timeframe, and Service Level Agreement

5. Deliverables

The implementing partner(s) should provide the following deliverables:

1. **GGP 2.0 Core maintenance.** Deliver a scalable, secure, and reusable Core platform with best-in-class fundraising features (donation flow, UX patterns, donor journeys) that supports market needs. The Core must support localization and integration with local PSPs and CRMs (e.g., Salesforce NPSP).
2. **Roadmap & Backlog Management.** Deliver an up-to-date product roadmap and structured backlog, prioritized based on share governance with offices.
3. **Project Reporting & Delivery Tracking.** Provide regular sprint and project status reports outlining progress, risks, delivery timelines, and performance metrics. This includes burn-rate reports showing hours consumed (for T&M cost) vs. percent of milestone completed. Also the IP will be required to provide a formal early alert when they reach 50%, 75% and 90% of the budget.
4. **Agile Sprint Participation & Output.** Contribute to Agile ceremonies and deliver bi-weekly sprint outputs, including user stories, backlog items, test cases, demos, and retrospectives.
5. **User Research & UX Testing Reports.** Support donor/admin user research and usability testing, providing insight reports, journey maps, and design recommendations.
6. **Design System & UI Templates.** Maintain and evolve reusable, accessible design system components and UI templates optimized for multi-market deployment
7. **Scalable & Secure Architecture.** Ensure the platform codebase and architecture are maintainable, scalable, and fully compliant with UNICEF's internal governance, security, and accessibility standards.
8. **System Integrations.** Develop and maintain integrations with payment gateways (e.g., Stripe, Nuvei), CRM (e.g., Salesforce NPSP), analytics platforms (e.g., GA4), and middleware.
9. **Quality Assurance & Testing.** Execute test plans including manual, regression, and automated testing, with full reporting of test outcomes and bug resolution logs.
10. **Hyper-care phase.** After go-live with markets, continuously monitor their performance and suggest improvements based on the learnings.
11. **Training & Documentation.** Produce technical and user documentation in English, and deliver remote live + digital training (videos, guides) for market teams and internal users.
12. **Security & Privacy Compliance.** Implement secure-by-design features and ensure adherence to UNICEF's data protection policies, including GDPR and PCI standards.
13. **Incident Management Support.** Maintain issue tracking (ideally through ticketing system) and response protocols for production incidents and ensure high availability during major fundraising events.
14. **Cross-Team Coordination.** Collaborate with UNICEF Individual Giving (IG) team based in Rome, the Digital Impact team based in Valencia, Analytics and market focal points to ensure successful delivery, testing, and adoption of platform features.

6. Reporting Requirements

The implementing partner(s) should provide their Information security policy and communicate any updates within 3 days. The implementing partner(s) would offer a quarterly business review, to be used at discretion. In addition, it should offer the following support:

- Guaranteed resolutions and potential code-fixes to blocking and / or critical issues related to the core platform which are demonstrated as necessary for UNICEF success (within 24 hours)
- Guaranteed responses to issues, questions, and support requests related to the implementation or utilization of the CMS or its core software (within 1 business days)
- Guaranteed resolution of bugs and / or implementation issues with the CMS platform that exist in UNICEF platform code (within 3 business days)

7. Location and Duration

The Long-Term Arrangement for Services (LTA) will be established for an initial period of up to three (3) years with a possibility for UNICEF to extend it for two (2) additional periods of two (2) years each, at UNICEF's discretion and subject to the implementing partner's satisfactory performance. UNICEF reserves the right to rescind the arrangement during the LTA period should performance not meet its requirements.

The LTA is a contractual framework in which UNICEF, and the selected vendor agrees on a list of services, the conditions for their delivery, and the applicable pricing for a defined period. Once the LTA is established, specific orders along with the detailed requirements and time frames for each order will be placed. This will be done by issuing UNICEF Institutional/ Corporate Contracts, with the terms and conditions agreed in the LTA. The agreed Unit Rates and fees established in the LTA will be used to calculate the cost of each contract.

Under the LTA, UNICEF does not warrant that any quantity of services shall be purchased during the term of the arrangement and is not bound to purchase any minimum amount of services. UNICEF reserves the right to utilize other sources at its discretion.

UNICEF reserves the right to grant other UNICEF Divisions, UN agencies, Funds or Programmes to purchase the same or similar services from the selected LTA vendor at their sole discretion under the same terms and conditions of the established LTA. They would have, however, to conclude a separate contract(s) and place direct order(s) with the technology vendor for the requested services.

Travel:

The vendor is not expected to travel but in case of any travel requirement, it will be administered in line with UNICEF travel policies, upon proof of travel costs. The vendor will be responsible for arranging their own travel and will be reimbursed accordingly upon presentation of receipts and based on UN standards of travel:

- Travel paid for by UNICEF shall be based on economy-class travel.
- Before undertaking any travel, approval of the fare should be requested from UNICEF. Airfare will be reimbursed upon submission of proof of travel and up to fare entitlement provided or

actual cost, whichever is lower. Terminal fees will be reimbursed upon submission of proof of travel and up to the UNICEF terminal fees prices, or actual cost, whichever is lower.

- Combination cost of the accommodation, meals, and incidentals shall not exceed applicable United Nations Daily Subsistence Allowance (DSA) rates, as promulgated by the International Civil Service Commission (ICSC): <http://icsc.un.org/> (information on all countries and destinations can be found by navigating on the map).

8. Qualifications or Specialized Knowledge/Experience Required

- Experience and expertise:
 - Optimizely certified Implementing Partner
 - Deep understanding of and experience on the entire Optimizely ecosystem
 - Ability to provide strategic consulting and apply best practices to align platform capabilities with client business goals
- Resources
 - Technology-qualified: skill set on platform technologies used in Optimizely
 - Platform-certified: Optimizely certified developers
 - Proven customization and integration capabilities, particularly integration with online payment gateways (e.g. Vindi in Brazil) or payment orchestrator (e.g. Spreedly), CRM (e.g. Salesforce NPSP), analytic platforms (e.g. Google Analytics, etc.)
 - Ability to remotely provide operations support to onboarded markets worldwide
 - English language is a must, other languages such as Spanish as asset
- Implementation approach
 - Ability to provide a clear roadmap and timeframe for implementation
 - Defined pre-and-post implementation procedures
- Proven success
 - Demonstrated experience with a number of relevant projects completed in the last 3 years
 - Evidence of commitment to client success: case studies, white papers, testimonials, etc.
- Community engagement
 - Active engagement with Optimizely community
 - Publication and sharing of Optimizely-related content
 - Familiar with Optimizely's latest update and DXP best practices in general
 - Experience with the Optimizely App marketplace
- Financial viability
 - Vendor to provide copies of the latest 2 years audited Financial Statement (Income Statement, Balance Sheet, and Cash Flow Statement) as well as a Certificate of Incorporation

9. Evaluation process and methods

Standard Evaluation approach: UNICEF will consider both technical and financial proposals in an 70/30 split (technical/commercial).

Technical Score	Financial Score
70 points	30 points

Technical Evaluation

The proposal will be evaluated against the criteria stated in the Appendix 1. To be considered technically compliant, a minimum of 49 points out of 70 points must be obtained. All vendors who meet the minimum score will be considered further for Financial Proposal Evaluation.

Commercial Evaluation

The Financial Proposal should be separate from the technical proposal. The format shown on Annex D of the tender document (Financial Proposal Format) is suggested for use as a guide in preparing the Financial Proposal.

The total weight allocated for the financial component is 30%. The maximum number of points will be allotted to the lowest Financial Proposal that is opened and compared among those Financial proposals received which obtain the threshold points in the evaluation of the technical component.

All other Financial Proposals will receive points in inverse proportion to the lowest price; e.g.:

$$\text{Score for Financial Proposal X} = \frac{\text{Max. Score for Financial Proposal (30)} * \text{Price of Lowest Priced Financial Proposal}}{\text{Price of Proposal X}}$$

Overall Combined Technical/ Financial Score:

The scores attained by the vendors in the technical and financial evaluations will be combined to determine the overall score, and proposals will be ranked accordingly. Each proposal will be evaluated against a weighting of 70% for the technical proposal and 30% for the financial proposal. The maximum total score is 100 points.

The highest ranked vendor will be awarded the primary LTA, while the second highest-ranked vendor will be awarded the backup LTA. In the event that the primary LTA vendor is unable to deliver the required services during the LTA implementation of the LTA or UNICEF decides that additional/different resources is required, UNICEF may approach the backup LTA vendor to provide the required services.

10. Administrative Issues

- With exception to the global market (referred also as Virtual Hub), local markets generate donation income in local currencies. Operational costs for the platform should be kept minimal to maximize the funds available for UNICEF's programmes for children.
- During the project, the IP will work with PFP central resources and market local resources to clarify and refine the functional features to be developed as per the GGP2 Feature Inventory list in Appendix 3.
- While this is not an exhaustive list, the IP is expected to bring their experience to refine the features for better functionalities and performance as well as enhanced user experience
- The list is based on known features at the time it was developed, and there might have been new capabilities developed in Optimizely platform, or new approaches in handling these features based on best practices or regulations, the IP is expected to raise these issues and propose a better approach or alternative

11. Project Management/Contract Supervisor and other stakeholders

Business product owner and contract supervisor: Fund Raising Manager, Individual Giving
Product development and business coordination: Database Administrator, Individual Giving
Product development and technical coordination: Chief of Information Comm. Technology
Requirements and Technical Project Management: ICT Systems Analyst

12. Payment Schedule:

Payment will be made upon submission and UNICEF approval of deliverables and satisfactory completion of the assignment.

The UNICEF institutional/ corporate contract issued within the framework of the LTA will reflect the agreed payment terms for the specific assignment, which may include one or more of the following:

- **Time and Material costs:** As specified in the contract, based on agreed hourly or daily rates for the works.
- **Individual Job Order (Statement of Work) costs:** As detailed in each specific job order, which will be fixed price and based on deliverables.
- **Any other costs:** Any additional costs such as travel must be pre-approved by UNICEF and will be reimbursed according to agreed terms.