

## Component II: Scope of Work

### **Provision of Global Payment Solutions and Cash and Voucher Data Management Services**

#### **2.1. Introduction**

Catholic Relief Services - United States Conference of Catholic Bishops (CRS) is a global humanitarian and development organization, providing emergency response and recovery programming to project participants in over 120 countries. Cash and voucher assistance (CVA) is a form of market-based programming that provides individuals with cash or vouchers to purchase what they need in functioning local markets. CVA has increasingly demonstrated its ability to deliver dignified assistance tailored to the unique needs of the communities that CRS serves. The approach not only addresses immediate humanitarian needs but also supports longer-term economic inclusion and recovery by boosting local economies. In light of these benefits, CRS is actively building its capacity for CVA and is committed to delivering \$1 billion in CVA by 2030. To achieve this goal, CRS is taking initiatives to increase its institutional cash readiness and capacity for delivering cash.

One component of this initiative is the development of the **Global Payment Solutions (GPS), which operate as global framework agreements to rapidly distribute cash assistance.** The purpose of the GPS is to provide CRS country programs and Partners with the ability to deploy cash-based responses in situations where either no prepositioned agreements exist with a financial service provider (FSP), or where agreements with an FSP exist, but the current needs cannot be met through them.

A second component of the initiative is **an effective data management system to support CVA and in-kind programs, enabling quality programming through humanitarian assistance distribution, tracking, and reporting.** In particular, CRS is in search of solutions that can seamlessly integrate with data collection tools and various payment mechanisms. The system ultimately should streamline operations, ensuring secure, auditable, and time-effective management to scale up CRS' humanitarian assistance programming, with a focus on cash and voucher assistance.

For these strategic reasons, CRS seeks to renew its global payment solutions and data management services, giving CRS country programs and Partners a wider range of response options, and providing timely support to affected populations. This initiative complements ongoing activities, such as the Readiness to Respond (R2R) program, to improve cash readiness of CRS country programs and Partners. In tandem, these initiatives seek to build organizational capacity to enable agile responses to emergency situations with prepositioned framework agreements.

#### **2.2. Problem Statement and Purpose**

CRS' ability to respond effectively in the early stages of an emergency with CVA depends upon how quickly services can be sourced and cash distributed to program participants. Unfortunately, rapid responses are prone to delays in procuring and contracting financial services which can take months to get set up. Furthermore, the time-intensive nature of data collection and processing impacts the implementation speed of CVA programs. These challenges underscore the need for prepositioned contracts and robust, interoperable systems to ensure timely, quality aid delivery. Thus, integrating global payment options with efficient data management services is crucial, enabling CRS country programs to mobilize resources swiftly in both emergency and non-emergency contexts.

To address this issue, CRS undertook two comprehensive internal reviews in FY23 to evaluate its current agreements for global payment solutions and data management services. These evaluations

aimed to gauge whether the service providers are meeting CRS' needs across the various regions by identifying any gaps in service coverage and assessing the efficacy of current contracts. The findings from these reports, in conjunction with CRS' procurement policies, led to the decision to initiate a new tender process to renew these services to improve the organization's capacity in both emergency and non-emergency situations.

## 2.3. Objectives and Scope

By repositioning global-level agreements with selected service providers, CRS country programs will have rapid access to additional response tools, supporting cash readiness. Therefore, CRS seeks to establish one or more global framework agreements with service providers who offer payment and financial services, with optional data management services. **These services will be evaluated separately, based on the lots shown below.** Bidders who offer one or more of the following services are encouraged to apply:

**Lot 1:** Provision of Payment and Financial Services, through

~~**Lot 1.A:** Prepaid cards, (no longer accepting bids for this lot)~~

**Lot 1.B:** Electronic fund transfers (EFT) and/or remittances,

**Lot 1.C:** Mobile money / mobile wallets (including aggregators),

~~**Lot 1.D:** Electronics vouchers, and (no longer accepting bids for this lot)~~

**Lot 1.E:** Other payment solutions.

**Lot 2:** Data Management System and Services (optional)

~~**Lot 2.A:** In-Kind Distribution Tracking (optional) (no longer accepting bids for this lot)~~

**Lot 1** is mandatory and seeks financial and payment service providers who can provide and manage humanitarian cash distributions to program participants, while **Lot 2** is optional and seeks data management systems that offer out-of-the-box solutions that seamlessly integrate with the financial and payment services.

Vendors may qualify for Lot 1 through sub-agreements or by providing APIs that enable the necessary services. Similarly, vendors may qualify for Lot 2 if their services include data management platforms that are linked with financial and payment services through APIs or established third-party agreements. In such cases, bidders should describe the features and characteristics of the connected APIs and third-party agreements, including the role of each party in the cash distribution cycle.

Bidders proposing solutions for both lots will be asked to describe how their platform meets the requirements of each lot, as stated in Section 2.4.

Service providers are welcome to submit applications individually or in partnership with other entities as part of a consortium. Organizations applying as part of a consortium should clearly identify all participating entities and explicitly state each party's role in the project.

## 2.4. Requirements and Evaluation Criteria

### 2.4.1 Desired Characteristics for Lot 1: Provision of Payment and Financial Services

The first lot relates to financial and payment service providers who can provide and manage humanitarian cash distributions to program participants in the geographic regions listed below. The following list reflects the criteria for which all Lot 1 proposals will be evaluated in the Technical Questionnaire, regardless of the sub-lot.

**Table 1: Requirements for Lot 1**

Category	Details	Requirement Status
<b>Supplier Eligible and Compliant</b>	- Supplier must meet General Requirements for participating in this tender, as specified in <b>Section 1.4.A General Requirements, (i) – (viii) of Component I.</b>	Mandatory
<b>Responsive</b>	- Services must be deployable within 5-7 days post-notification in emergency situations, and within 10-14 days in non-emergency situations.	Mandatory
<b>Accessible</b>	- Services providers must describe how solutions support individuals in disaster-affected, often rural or remote areas, with or without formal ID documents.	Mandatory
	-Service provider must ensure that all transfers, whether physical or digital, are accessible to individuals with disabilities and minimize travel to central distribution points to the extent possible.	Mandatory
<b>Extensive Coverage</b>	- Services must be functional in diverse contexts and regions, including cross-border capabilities.	Mandatory
<b>Multiple Transfer Options</b>	- Service provider must handle regular, repeated cash transfers of varying values, including cross-border and national transfers, and facilitate currency conversions.	Mandatory
<b>Flexible Delivery Mechanisms</b>	- Preference for electronic payment mechanisms (e.g., smart cards, mobile phones, remittances).	Optional
	- Mobile payment options must include verification processes for phone numbers and account openings, and be functional on both low-cost and smartphones.	Mandatory
<b>Control Mechanisms</b>	- Allow for restrictions on types of goods/services able to be purchased.	Optional
	- CRS can specify distribution roles and authorization levels at the country level.	Optional
<b>Scalable</b>	- Services must handle bulk transfers and scale operations to meet increased demand as necessary.	Mandatory
<b>Security and Privacy</b>	- Distribution processes must include robust security measures in line with standards like PCI DSS, ISO/IEC 2700x, and include adequate insurance against risks related to cash distributions.	Mandatory
	- Suppliers must indicate their compliance with relevant applicable data protection and privacy regulations and standards, including but not limited to AICPA, SOC 2, NIST guidelines, HIPAA, ISO/IEC 27001, GDPR (where applicable), SAS No. 70 Type II.	Mandatory
<b>Recipient Verification</b>	- Mechanisms must be in place to verify the identity of cash recipients or their proxies at account opening and/or distribution points, as relevant.	Mandatory
<b>Interoperable</b>	- Services should integrate and function seamlessly with existing systems and platforms via APIs across different operational environments.	Optional
<b>Technical Support</b>	- Service provider must provide their Service Level Agreement and specify technical support and troubleshooting of issues throughout the distribution process (e.g., failed transactions and loss or theft incidents).	Mandatory
<b>Reporting</b>	- Timely and accurate reporting on successful, failed, and returned transactions is required.	Mandatory
	- System has ability to generate an executive dashboard on cash distributed in USD.	Optional

	- If account opening is involved, detailed reporting on account activities like opening, loading, redemption, and distribution must be included.	Mandatory
<b>Audit and Compliance</b>	- Service provider must keep comprehensive logging of all system interactions, transactions, and balances, capturing details such as timestamp, user ID, action performed, and any changes made, ensuring traceability and accountability.	Mandatory
	- Regular audits by independent third parties must be conducted to assess compliance with industry standards, regulatory requirements, and best practices in data security and management.	Mandatory
<b>Data Management Policies</b>	- <b>Data Retention:</b> Service provider must ensure data is retained for up to 7 years. Data will be securely archived or purged according to predefined schedules.	Mandatory
	- <b>Data Portability:</b> Provider must ensure that data can be transferred securely upon request and exported in commonly used formats (e.g., CSV, XML, SQL). Provider must specify measures to protect and securely handle the export of sensitive and personally identifiable information (PII) to prevent unauthorized access or export outside the platform.	Mandatory
	- <b>Data Encryption:</b> Service provider must have robust encryption protocols for data to protect sensitive information from unauthorized access.	Mandatory
<b>Position on Biometric Data</b>	- CRS does not endorse the collection and processing of biometric data from program participants in the context of program implementation at this time. Service providers are encouraged to indicate biometric capabilities, but must suggest an alternative to biometric data.	Mandatory
<b>Training</b>	- Training should be provided for CRS, partner staff, and project participants to ensure understanding of the cash distribution process, ID requirements, and technology use.	Optional
<b>Extension of Contracted Services to CRS Partners</b>	- CRS may extend contracted terms to implementing partners with service provider's prior written approval, allowing access to services under the same terms within the agreement's scope, with each partner having a separate agreement with the provider.	Optional

#### 2.4.2 Geographic Coverage for Lot 1

CRS operates or provides support in over 120 countries worldwide, through its Country Programs, Program Offices, and Outreach Countries (CRS Partners).

- **Country Programs:** Full-scale, multi-sector CRS operations with an office and permanent staff presence in-country, led by a Country Representative.
- **Program Offices:** Limited CRS operation with a light complement of CRS permanent staff on the ground. Generally led by a Country Manager.
- **Outreach Countries:** CRS engagement, often through Partners, with no CRS office or permanent staff on the ground. Overseen by an Outreach Manager (CRS Partner) or CR of another country.

Bidders are asked to indicate in their proposal in which countries they operate. The following table provides bidders with a list of current Country Programs, Program Offices, and Outreach Countries.

**Table 2: Countries Where CRS is Providing Support**

Country Programs						
Benin	Ethiopia	Lesotho	Burkina Faso	El Salvador	Afghanistan	Cambodia
Burundi	Kenya	Madagascar	Ghana	Guatemala	Bosnia & Herzegovina	India
Cameroon	South Sudan	Malawi	Guinea	Haiti	Egypt	Laos (Lao PDR)
Central African Republic	Sudan	Zambia	Mali	Honduras	Iraq	Nepal
Democratic Republic of Congo	Uganda	Zimbabwe	Niger		Jerusalem, West Bank, and Gaza	Philippines
Nigeria			Senegal		Lebanon	
Rep. of Congo			Sierra Leone		Moldova	
Rwanda					Pakistan	
Togo						
<b>9</b>	<b>5</b>	<b>5</b>	<b>7</b>	<b>4</b>	<b>8</b>	<b>5</b>
Program Offices						
Chad	Somalia	Mozambique	Côte d'Ivoire	Mexico	Greece	Bangladesh
	Tanzania		The Gambia	Nicaragua	Jordan	Indonesia
			Guinea-Bissau		Serbia	Micronesia
			Liberia		Yemen	Myanmar
						Timor-Leste
						Vietnam
<b>1</b>	<b>2</b>	<b>1</b>	<b>4</b>	<b>2</b>	<b>4</b>	<b>6</b>
Outreach Countries						
	Djibouti	Angola	Cape Verde	Bahamas	Albania	China
	Eritrea	Botswana		Brazil	Algeria	Fiji
		Namibia		Chile	Armenia	Kazakhstan
		South Africa		Colombia	Azerbaijan	Kyrgyzstan
		Swaziland		Cuba	Bulgaria	Mongolia
				Curacao	Croatia	Samoa
				Dominica	Cyprus	Sri Lanka
				Dominican Republic	Georgia	Tajikistan
				Ecuador	Hungary	Thailand
				Grenada	Italy	Tonga
				Jamaica	Kosovo	Turkmenistan
				Peru	Libya	Uzbekistan
				St. Lucia	Macedonia	
				Trinidad & Tobago	Mauritania	
				Venezuela	Montenegro	
				St. Vincent and the Grenadines	Poland	
					Romania	
					Slovakia	
					Tunisia	
					Turkey	
					Ukraine	
<b>0</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>16</b>	<b>21</b>	<b>12</b>
Totals						
<b>10</b>	<b>9</b>	<b>11</b>	<b>12</b>	<b>22</b>	<b>34</b>	<b>23</b>

### 2.4.3 Additional requirements for each sub-lot in Lot 1

In addition to the criteria above, sub-lots 1.A – 1.D should adhere to the requirements in Attachments 1 – 4 of this tender, respectively.

### 2.4.4 Desired Characteristics for Lot 2: Data Management Services

In the second lot, suppliers are invited to detail how their data management platform seamlessly integrates with payment and financial service providers (Lot 1), as well as the processing capabilities of their platform, including features such as beneficiary registration, data management, and in-kind tracking. Proposals should specifically address the system’s ability to handle diverse inputs—such as beneficiary data, market data, post-distribution monitoring (PDM) surveys, and needs assessments—and use these to facilitate core functions. These include creating distribution plans, adjusting entitlements, issuing payment orders, and reconciling transactions. Additionally, the proposed system must be able to seamlessly integrate with various payment mechanisms used by financial and payment service providers to enable functionality. The system should be able to generate reports and analytics, or be able to export data in various file formats (e.g., .xlsx, .xlsm, .csv, JSON, and XML).

**Table 3: Requirements for Lot 2**

Category	Details	Requirement Status
Platform	- SaaS (Software as a Service) system to ensure cloud-based accessibility, scalability, and maintenance.	Mandatory
	- Reporting on common indicators (e.g., number of program participants, amount of cash distributed, geographic and delivery mechanism trends).	Mandatory
	- Offline data collection & management and analysis of cash, voucher, and/or in-kind data.	Mandatory
	- Authorization controls and user levels for analyzing data.	Mandatory
	- Ensure compliance with international and local data protection laws.	Mandatory
	- Customization of platform at regional and country levels to meet project-specific needs (e.g., type of data gathered, internal controls).	Optional
	- Customizable role-based access management.	Mandatory
	- Enterprise console & executive dashboard.	Optional
	- The system must support Single Sign-On (SSO) capabilities.	Mandatory
	- Supports Android mobile apps with offline data collection capabilities.	Mandatory
Security	- Suppliers must indicate their compliance with relevant applicable data protection and privacy regulations and standards, including but not limited to AICPA, SOC 2, NIST guidelines, HIPAA, ISO/IEC 27001, GDPR (where applicable), SAS No. 70 Type II.	Mandatory
Program Set-Up	- Data integration capability with inbound and outbound APIs with CRUD (Create, Read, Update, Delete) functions.	Mandatory
	- Management of program participants or merchant profiles.	Mandatory
	- CRS Staff should be able to perform various operations at different authorization levels, while maintaining internal segregation of duties protocols.	Mandatory

	- Integration and management of multiple e-transfer mechanisms (Prepaid card, mobile money, e-vouchers, direct distribution).	Mandatory
	- Ability to store USD exchange rates for cash distributed in local currency.	Mandatory
<b>Communications</b>	- Record and notify all error messages.	Optional
	- Record and notify all failed transactions.	Mandatory
	- Record and notify all successful transactions.	Mandatory
<b>Transactions</b>	- Program participants have individual accounts on the platform.	Mandatory
	- Authenticate the identity of program participants prior to the transaction, with an understanding that initial verification may not preclude additional KYC checks or potential rejections by payment service providers.	Mandatory
	- Deduct value from program participant accounts, following a transaction.	Mandatory
	- Trace all kinds of transactions with unique identifiers, along with all needed details.	Mandatory
	- Various stages of credit (Preparer, Approver, Viewer/Auditor) and ability to configure approval process at the agency and program level.	Mandatory
<b>Reporting</b>	- Advanced dynamic reports in graphical, chart, tabular, waterfall, and dashboard forms	Optional
	- Ability to seamlessly connect to PowerBI for reporting.	Mandatory
	- Custom reports, schedule report delivery, share report.	Mandatory
	- Real-time dashboard (transfer modality; amount transferred; number of Participants disaggregated by gender, geographic area/region; activities by sector).	Mandatory
	- Transaction Reports (Participant Cards, Vendor Payments).	Mandatory
	- Ability to report on equivalent of USD distributed in cash for each program	Optional
<b>Data Management Policies</b>	- <b>Data Retention:</b> Provider must ensure data is retained for up to 7 years. Data will be securely archived or purged according to predefined schedules.	Mandatory
	- <b>Data Portability:</b> Provider must ensure that data can be transferred securely upon request and exported in commonly used formats (e.g., CSV, XML, SQL). Provider must specify measures to protect and securely handle the export of sensitive and personally identifiable information (PII) to prevent unauthorized access or export outside the platform.	Mandatory
	- <b>Data Encryption:</b> Provider must have robust encryption protocols for data to protect sensitive information from unauthorized access.	Mandatory
<b>Position on Biometric Data</b>	- CRS does not endorse the collection and processing of biometric data from program participants in the context of program implementation at this time. Service providers are encouraged to indicate biometric capabilities, but must suggest an alternative to biometric data.	Mandatory



#### **2.4.5 Additional requirements for In-Kind Tracking sub-lot 2.A**

In addition to the criteria above, if the service provider is including in-kind tracking services (Lot 2.A) in their proposal, please refer to Attachment 5 for additional details. This includes platform features for tracking and managing the distribution of in-kind aid. Key features should include inventory and distribution management, tracking of goods from supplier to recipient, beneficiary verification, customizable reporting tools, and integration capabilities with existing logistical and management systems to ensure transparency and accountability in aid delivery.

#### **2.5. Selection Process and Service Deployment**

Service providers submitting a bid for any item in Lot 1 should note the additional specifications in Attachments 1 – 4. If a service provider offers more than one delivery mechanism in Lot 1 (i.e., more than one sub-lot), then their proposal should reflect that and detail the specific aspects of each delivery mechanism.

Lots 2 and 2.A are optional and will be evaluated separately. However, please note that Lot 2 requirements apply to Lot 2.A as well.

Suppliers who complete the technical and financial evaluations and demonstrate the ability to add value to CRS' global humanitarian response activities may be contracted for services outlined in this Scope of Work. Functionality tests and field simulations may be required before solutions are used in a CRS project.

#### **2.6. Agreement Validity**

Contracts will be valid for an initial period of two (2) years, with the possibility of three (3) additional year-long extensions, for up to five (5) years maximum.



**Attachment 1: Specific Requirements for Prepaid Cards (Lot 1.A) (no longer accepting bids for this lot)**

Proposals that offer **prepaid card** services are requested to respond to and meet the following terms and conditions:

Category	Details	Requirement
<b>Issuance</b>	- Prepaid cards delivered as inactive/unloaded for repositioning at CRS regional or headquarters offices.	Mandatory
	- Cards loaded electronically by the service provider or CRS staff via a secure web portal.	Mandatory
	- No account opening required for recipients.	Mandatory
	- CRS and/or donor logos can be included on the card face.	Mandatory
	- CRS retains the right to distribute cards according to internal mandates and policies.	Mandatory
<b>Usage</b>	- Cards operate on Visa or MasterCard financial networks.	Mandatory
	- Usage restrictions managed via a web portal with security measures.	Mandatory
	- Options for use at ATMs with security PIN or vendor shops with Point of Sale machines on the Visa or MasterCard network.	Mandatory
	- Withdrawals limited by daily in-country limits and card balances; no credit extended.	Mandatory
	- Cards must be reloadable.	Mandatory
	- CRS can enable/disable ATM access.	Mandatory
<b>Account Management</b>	- Cards linked to CRS's account for management from activation to deactivation.	Mandatory
	- Expiration dates predefined in agreement with the Financial Service Provider.	Mandatory
	- CRS to manage and monitor activated cards via an online portal with industry-standard security.	Mandatory
	- Card deactivation occurs immediately or within 24 hours upon CRS request via the online portal.	Mandatory
<b>Reporting</b>	- Preferred: Online access to real-time data of card balances, transactions, and service fees.	Optional
	- Secondary: Individual and bulk financial statements of activated cards.	Optional
<b>ICT Integration</b>	- Service provider must integrate their card loading/activation/unloading processes with CRS' data management platform through APIs.	Mandatory

Please direct any questions related to these requirements to [Russell.harpring@crs.org](mailto:Russell.harpring@crs.org).

## Attachment 2: Specific Requirements for EFTs / Remittances (Lot 1.B)

Proposals that offer **EFT/remittance services** are requested to respond to and meet the following terms and conditions:

Category	Details	Requirement
<b>Issuance</b>	- Provider will issue transaction codes to CRS or directly to recipients via SMS.	Mandatory
	- Transfers loaded electronically, in bulk, or individually, through an online portal.	Mandatory
	- No account opening required for beneficiaries.	Mandatory
	- Cash disbursements at brick-and-mortar locations and/or through roving agents, where applicable.	Mandatory
	- CRS maintains the right to distribute transaction codes according to internal mandates and policies.	Mandatory
<b>Account Management</b>	- Transfers managed through an online portal, allowing for both bulk and individual management.	Mandatory
<b>Reporting</b>	- Preferred: Online access to real-time data of money transfers and service fees incurred.	Optional
	- Secondary: Individualized and bulk financial statements of money transfers.	Optional
<b>ICT Integration</b>	- Service provider must integrate its transfer procedures with CRS' data management platform through APIs.	Mandatory

Please direct any questions related to these requirements to [Russell.harpring@crs.org](mailto:Russell.harpring@crs.org).

### Attachment 3: Specific Requirements for Mobile Money Aggregators (Lot 1.C)

Proposals from service providers that offer **mobile money aggregator services** are requested to respond to and meet the following terms and conditions:

Category	Details	Requirement
<b>Issuance</b>	- Mobile wallets to be loaded electronically by the service provider or CRS staff through a web portal with security measures.	Mandatory
<b>Usage</b>	- Mobile wallets will function with more than one mobile money operator.	Mandatory
	- Recurring loads to mobile money wallets must be possible.	Mandatory
<b>Account Management</b>	- Transfers will be managed through an online portal, allowing for bulk and individual transfers.	Mandatory
<b>Reporting</b>	- Preferred: Online access to real-time data of mobile transfers and service fees incurred.	Optional
	- Secondary: Individualized and bulk financial statements of money transfers to mobile numbers.	Optional
<b>ICT Integration</b>	- Service provider must integrate their transfer procedures with CRS' data management platform through APIs.	Mandatory

Please direct any questions related to these requirements to [Russell.harpring@crs.org](mailto:Russell.harpring@crs.org).

**Attachment 4: Specific Requirements for Electronic Vouchers (Lot 1.D) (no longer accepting bids for this lot)**

Proposals from service providers that offer **electronic voucher services** are requested to respond to and meet the following terms and conditions:

Category	Details	Requirement
<b>Voucher Program</b>	- System must allow for e-vouchers to be distributed in varied denominations, or specific items, baskets, or values.	Mandatory
	- Voucher vendors must be able to authenticate their identity (in system) before executing transactions.	Mandatory
	- Voucher vendors must be provided with means to verify program participant identification.	Mandatory
	- Transactions must be given a unique identifier with attributes (date, time, voucher number, value, etc.).	Mandatory
	- The system must be operable in low-connectivity or offline settings.	Mandatory
	- The system must provide confirmation of successful transactions, or error message for failed transactions.	Mandatory
	- The voucher system must support one-off and recurrent programs, with possible top-ups.	Mandatory
	- The system must assign a unique ID to each program participant to protect personal information, while also including capabilities to verify participants via PIN code, E-signature, ID card photo, etc. to match beneficiary data with ID documents.	Mandatory
<b>Account Management</b>	- Transfers managed through an online portal, allowing for both bulk and individual management.	Mandatory
	- Authorized users must be able to activate, de-activate, and reassign cards.	Mandatory
<b>Data Entry</b>	- Ability to input customized project information, including participant data fields, product data fields, and goods categories.	Mandatory
<b>Reporting</b>	- Preferred: System can provide on-demand updates of transactions for both program participants and vendors.	Optional
	- Secondary: Individualized and bulk financial statements of money transfers.	Optional
<b>ICT Integration</b>	- The voucher platform is interoperable with third-party systems, such as local FSP platforms and data management software (e.g., CommCare).	Mandatory

Please direct any questions related to these requirements to [Russell.harpring@crs.org](mailto:Russell.harpring@crs.org).

**Attachment 5: Specific Requirements for In-Kind Distribution Tracking (Lot 2.A) *(no longer accepting bids for this lot)***

Proposals from service providers that offer **In-Kind Distribution Tracking** are requested to respond to and meet the following terms and conditions:

Category	Details	Requirement
<b>Tracking and Distribution Management</b>	- Support for tracking in-kind goods distribution, assigning different commodities to each program participant (or groups).	Mandatory
	- Module to create, edit, and store distribution plans.	Mandatory
	- Ability to create in-kind baskets, or groups of items, for distribution.	Optional
	- Ability to track items by QR or barcode from supplier to participant.	Mandatory
	- Customized database, commodities dashboard, and shipment tracking module.	Mandatory
	- Inventory monitoring and management at each warehouse or distribution point.	Mandatory
	- Detailed visualization of sales or goods distribution.	Optional
	- The system must assign a unique ID to each program participant to protect personal information, while also including capabilities to verify participants via PIN code, E-signature, ID card photo, etc. to match beneficiary data with ID documents.	Mandatory
	- Add or edit distribution locations/sites.	Mandatory
<b>In-Kind Tracking</b>	- Track status of all commodities by location (e.g., warehouse, distribution point) and type.	Mandatory
	- Tag commodities as damaged and record losses.	Mandatory
	- Track commodities received by each program participant.	Mandatory
	- Alerts for inventory levels and commodities approaching expiration.	Mandatory
<b>Account Management</b>	- User permissions and restrictions for distributing approved items and quantities by authorized users to pre-approved points.	Mandatory
<b>Product Management</b>	- Manage product data fields; add, delete, or edit product information.	Mandatory
<b>Reporting</b>	- Report total quantity of commodities for participants.	Optional
	- Report total number and types of commodities distributed by location and date.	Optional
	- Data on commodities at each point in the distribution process.	Optional
	- Report undistributed goods and losses.	Optional

Please direct any questions related to these requirements to [Russell.harpring@crs.org](mailto:Russell.harpring@crs.org).