

REQUEST FOR PROPOSALS RFP #0317A

SHAREPOINT DEVELOPMENT AND IMPLEMENTATION

**In support of
ELIZABETH GLASER PEDIATRIC AIDS FOUNDATION (EGPAF)
1140 Connecticut Avenue, NW, Suite 200
Washington, DC 20036**

Firm Deadline: (Friday, February 28, 2020)

1. INTRODUCTION: OVERVIEW OF EGPAF

The Elizabeth Glaser Pediatric AIDS Foundation (EGPAF) is the global leader in the fight against pediatric HIV/AIDS and reaches more than 27 million women with services to prevent transmission of HIV to their babies. EGPAF is currently supporting activities in 19 countries and over 5000 sites to implement prevention, care, and treatment services; further advance innovative research; and execute global advocacy activities that bring dramatic change to the lives of millions of women, children, and families worldwide. For more information on EGPAF's programs please visit: <http://www.pedaids.org>.

To carry out our projects and other activities, a majority of employees work from 13 country offices in Africa or from in country sub offices. EGPAF's headquarters is in Washington, DC and it has two small offices in Los Angeles, California and Geneva, Switzerland. Internet bandwidth varies widely in the various offices across Africa where the foundation operates.

2. BACKGROUND

EGPAF currently maintains an intranet developed by Interact Software, and includes multiple country, department, teams and project sites; document libraries; links to other products and services (common systems). The intranet portal is used by approx. 3100 users and exceeds 6,300 artifacts (20-30 gigabytes).

EGPAF is a Microsoft-based organization. EGPAF currently uses Microsoft OneDrive for document management and will introduce Microsoft Office 365 features across the organization, beginning with department/team/project Team & SharePoint collaboration sites during Q1 2020.

EGPAF is looking to replace the current intranet with an online (cloud based) SharePoint on Office 365 environment as the primary organizational intranet, and a "one-stop" portal for accessing productivity and collaboration/communication tools, function as a document management repository and provide a centralized link to common systems.

The desired outcomes of the SharePoint implementation are:

- Enhanced collaboration capability between departments, different program areas and different geographically dispersed teams; improved unstructured information management capabilities; supported integration of tools and data specifically with additional features within Office 365 and other external systems to create one seamless ecosystem.

EGPAF is seeking proposals from potential firms to provide SharePoint development and implementation services. The SharePoint Intranet project will be implemented in multiple phases. (See High Level Scope Summary in Section 3).

The scope of the project will be requirements gathering, governance development, architecture and build-out of the SharePoint site, building workflows, system integration as well as general optimization of existing Office 365 functionality (Teams, SharePoint sites, and reporting metrics). The outcome should improve user-system interaction within SharePoint and Office 365.

The vendor for the implementation of SharePoint will improve our current Office 365 and SharePoint system, and offer training services that will enable the organization to optimize its use of the SharePoint as an intranet for all its internal operational departments and program areas.

3. PURPOSE/SCOPE OF WORK

The awarded vendor will assist EGPAF in performing a baseline assessment of the existing infrastructure including gather and document requirements (scoping), develop an implementation and backup plan, and execute against this plan.

EGPAF is seeking proposals from vendors that have extensive experience working with non-governmental organizations with all aspects of implementation to implement the following scope:

A) Project Management

A project plan with dates and milestones shall be created by the vendor and followed throughout the engagement. The vendor shall work with a project manager from EGPAF to plan and schedule all work.

B) SharePoint Design

Evaluation performed by the vendor will validate that the setup configuration and foundation is in accordance with best practices and will function as expected. This will include but is not limited to the following sections:

i) Functional Requirements Document

The *Functional Requirements Document* should capture use cases for utilizing Sites, Content, Enterprise Search, and Communities, high level Site layout, branding and requirements for performance, capacity, security and availability. Search will encompass

internal and external files and/or databases.

The *Functional Requirements Document* should capture high-level information concepts and be traceable to specific business capabilities and/or business objectives. The vendor will deliver an Information Architecture which will include a Taxonomy, Site Folder Structure, User & Group Access, Roles, and Permissions, Metadata, Data Structure, Search, Web Services, Role Based Security, Access (Inter, Intra, Extranet), and Application Integration.

All work will be conducted according to EGPAF Branding Standards, which will be shared with the winning vendor.

ii) Governance Plan

EGPAF will develop a draft *Governance Plan* that will need to be reviewed for completeness and tailored to any necessary specifics discovered during the design process. The final plan should define the rules, procedures and roles necessary for successful Share Point system, site administration and growth. A recommendation of minimal and optimal staffing levels for the system as designed should also be included.

iii). Information Architecture

The *Information Architecture* should define the structural, information, and technical SharePoint configuration necessary to satisfy functional requirements and conform to the Governance Plan, while minimizing ongoing technical support requirements. The information architecture design shall include taxonomy, metadata parameters, security configuration, navigation and site hierarchy. The design should include any modifications required during the process of migration to ensure the design follows best practices and meets the needs of EGPAF.

iv) Training Plan

The *Training Plan* should identify the training necessary for successful SharePoint system and site administration/user level training. The EGPAF IT Department will review these deliverables and, as needed and within reason, the vendor will make revisions until they are accepted by the department.

C) SharePoint Build

The vendor will improve the Office 365/SharePoint system that currently exists, as well as new workflows, improve the existing workflow, streamline document management, enhance collaboration within SharePoint, as well as the general improvement of the current System aesthetics. The vendor will present the solution in a test environment to the IT team and the Project Manager for assessment and consideration for GO-NO-GO before uploading to the SharePoint live environment.

i) System Configuration

With assistance from EGPAF IT staff, the vendor will map out the necessary configurations within SharePoint, including creating a backup strategy and management for the modules built.

ii) Supporting Documentation

The vendor will provide a detailed documentation together with the entire code and all designs used in SharePoint development. The documentation will be available in both softcopy and hardcopy while the code will be available in softcopy. The vendor team will together with the EGPAF IT department to save the code while testing the same. Signoff will be dependent on satisfactory handing over of the detailed documentation that is acceptable to the EGPAF IT team. The EGPAF IT Senior Director will be the only authorized person to signoff the handover document.

iii) System Configuration Document

The vendor will document the details of the system configuration and include the same in the handover document to be signed off by the EGPAF IT Senior Director.

iv) Test Plan

When the EGPAF IT Senior Director and Project Manager provides initial acceptance of the solution, the vendor, in collaboration with EGPAF IT department, will develop a Test Plan document. EGPAF IT staff together with the vendor technical team will execute the Test Plan and document defects that are created after the testing plan is executed. The vendor will be responsible for resolving the defects and the test process re-activated again to ascertain all the documented defects have been fixed before live rollout.

v) Instructional Documents

The vendor will provide instructional documents necessary for covering all standard and recurring operational tasks for each environment including but not limited to “System Backup and Restore”, “Database Maintenance Tasks”, “Environmental Build to Build Upgrade Steps”, etc. All template/functionality customizations should be documented.

D) SharePoint Deployment

After a signed off functional specifications has been developed by EGPAF and the vendor and an acceptance signed off, the vendor will guide preparation for and deployment of the production system by availing a detailed project management document with clear step by step project execution plan with detailed and clear agreed timelines.

The winning vendor will be provided with a sitting space at EGPAF Office in Washington, DC with fully operational internet when necessary.

i) System State

All instances should be identically configured.

ii) Training

As part of deployment, the vendor will also be required to develop training materials (This will include the development of detailed system manual and PowerPoint training materials) and deliver training for department/country admins/power users, who will serve as SharePoint champions for the entire EGPAF team.

This training should enable users to manage content on their department/program/team sites. Where permitted by the Governance Plan, this training should also allow users to tailor their sites to satisfy specific collaboration needs. Training materials developed should enable EGPAF IT to provide for ongoing training of future SharePoint content managers. In addition to business user training, the vendor will be required to provide knowledge transfer and formal training to All the IT staff tasked with SharePoint administration responsibilities.

Training should include the following:

- Technical training covering usage of Powershell and other scripting to streamline System Administrator functions and provide enhanced system administrative capability.
- System Administrator training and knowledge transfer to enable staff to effectively support and manage SharePoint Online.
- Site Administrator training to enable staff to effectively manage their sites including workflows and managing content.
- End User training covering access, navigation, and general usage of the new intranet.

iii) Recommendations

The vendor should provide a list of recommendations based on out of scope, but related issues and discoveries and decisions made throughout the project with the aim to maximize the value and mitigate risk of the resulting system. Any additional recommendations will be reviewed by EGPAF and only added to the scope through a contract amendment.

iv) SharePoint Application Development

As for the organizations' existing document and web management infrastructure, the vendor will be required to provide the following:

a) Solution Implementation Plan

The vendor, in consultation with EGPAF recommended staff, will develop an implementation plan that encompasses all of the organization's intranet improvement as well as the functional bit of it. EGPAF will provide additional information to the winning vendor regarding existing content at the onset of the project should there be any clarifications to be sought by the contractor.

b) Develop Applications and Workflows Specific to the Organization's Requirements

In addition to the implementation of the SharePoint infrastructure, sites and consistent branding, the vendor will be required to develop but not limited to new SharePoint applications and workflows as outlined below. The functional specifications that will be developed by the EGPAF team together with the vendor and signed off on will have a comprehensive scope that will detail the entire works to be accomplished.

c) Develop backup and recovery procedures.

High Level Scope Summary

- Analyze the current Office 365 and SharePoint environment and create a solution to further optimization the system (e.g. workflows, Document libraries, collaboration etc.).
- Migrate existing data, documents, and other information artifacts from the current EGPAF intranet.
- Design and implement personalized employee workspace, based on various use cases, to improve on productivity within various function units. This will include managing pending workflow tasks, custom to do lists and personal planner.
- Refine content upload, management and contribution process to enhance collaboration and creation of content within SharePoint.
- Team tools - Define proper collaboration spaces to assist the teams to work better together through collaboration. Having common tools e.g. calendar planner, team blogs, teams chat and shared working documents and files.
- Content Sharing and customized notifications - Create a model that allows the communications team to share newsletters and updates with ease through the intranet. In addition, the system should have the ability to share intuitive notifications such as pending personal tasks or a delayed request.
- Implement an action tracker that encompasses action points arising from various meetings or individual issues and their corresponding deliverables, updated and with insights as well as visibility on performance through analytics with additional specialized customization.
- Executive Leadership Team Dashboard - Create a High-level dashboard that shows insights and activities across various systems and units within SharePoint.
- Enhanced reporting - Refine reporting parameters for all applications.
- Integrate IT service desk/helpdesk module.
- Create a solution contingency plan to manage data limits within SharePoint and search ability for archived content.

Phase 2 integration (possible but not limited to)

- Automate staff onboarding process through creating an e-learning portal that includes training templates to improve the staff onboarding process as well as improve orientation process. This should include core assessment guidelines, presented in a readable format, allowing users to sign off that they have read and understood the terms and conditions. The application should then provide an auditable report.
- Managing of staff training - Allow users to create a training plan/ schedule that can then be tracked over the year. The application should offer reports on who has undertaken/not undertaken a specific training.
- Develop and automate staff contact list (enable the call tree for emergencies) with details of each staff member and to include key business non-staff contacts database. The contact list

will provide an integrated solution to avail SMS communication services with all staff members.

- Other Workflows, Applications and Modules as discovered during requirements gathering.

The detailed scope will be captured well before the final detailed SOW sign off that will be developed by the EGPAF team together with the winning bidder and the document will guide the entire project and will be the development reference point.

4. DELIVERABLES

EGPAF is looking for a vendor to help with the project framework and deliverables, and to provide high-level third-party guidance about the project. The successful vendor will have, but not limited to, the experience in the following areas:

- Online/Cloud based SharePoint development on the O365 platforms.
- Project management.
- Experience with working with Non-Profit Organization and other big organization in implementation of SharePoint.
- Development of a security and rights management model.
- Enhanced features and functionality assistance (such as BI, Dashboards, Office 365 Application integration, Third-Party Application integration).

Together with the outlined deliverables in Section 3, Sub-section (3, D) the winning vendor will be expected to Deploy and Implement additional SharePoint workflows and applications within the EGPAF online environment to go hand-in-hand with a detailed SOW as follows:

Deliverables
Improving and implementing our current online SharePoint intranet design, which will be outlined based on the above descriptions. The intranet should have: <ul style="list-style-type: none">• Additional collaboration spaces• Added features for personalized use of SharePoint• Common area for the staff members to find information on schedules (Calendars, announcements and any other common foundation notifications)• Well-designed user interface for each of the different areas of operations and programs.
Prepare the existing SharePoint Environment to provide for a smooth development phase to assist in hosting the new developed SharePoint Applications.
Develop additional workflows as listed in section 3, Phase 1. Final Signed Off Functional Specifications that will be developed between the winning bidder and EGPAF will be the reference-binding document for the project.
Develop all documents required pre-and post-implementation process. <ul style="list-style-type: none">• Deployment and Implementation plan.• Post Deployment Technical Document.

- Training document (Both end user and the admin documents)

Implement Business intelligence and analytics for:

- SharePoint online activity based on logins and user activity (Admin access only)
- Application requests, status of requests and insights on frequency
- Track activities within the above applications
- Suggest other ways that the organization can use various Office 365 features to enhance productivity and security

Training to be provided based on the above-named implementations and developed applications:

- Administration on SharePoint.
- Training for End User SharePoint.
- Administration and end user training on the above-mentioned applications.

5. MINIMUM REQUIREMENTS:

A) Technical Approach and Methodology

In this sub-section, respondents should explain their understanding of the objectives of the assignment, approach to the services, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach.

B) Work Plan

In this sub-section respondents should propose the main activities of the assignment, their content and duration, phasing and interrelations, milestones (including interim approvals by the Client), and delivery dates of the reports. The proposed work plan should be consistent in technical approach and methodology. A detailed project plan with all milestones and timelines should be included here.

C) Staff Experience

Respondents to this RFP must submit resumes for the staff proposed to deliver service to EGPAF. Staff must have experience implementing SharePoint in Office 365 environment and possess Microsoft SharePoint Server Certifications. The winning respondent must guarantee that proposed staff will actually deliver the proposed services, or where necessary, be substituted for staff with equivalent experience.

D) References

Respondents to this RFP must provide references to verify capabilities, experience, and work history in Microsoft SharePoint implementation. A minimum of three (3) references are required. References should consist of projects of a similar scope, complexity. The reference contact information shall include the customer name, start/end dates of the project, customer e-mail

address, street address, telephone number, a description of the services provided and timeframe of project.

E) Samples

Respondents to this RFP must submit samples of SharePoint designs created as part of previous or current client engagements. Sample screenshots (or equivalent) and links to associated websites (where available) are sufficient to satisfy this requirement.

F) In-Person Interviews and Demonstrations

Selected vendors may be contacted to arrange in-person interviews and demonstrations with the evaluation committee. The evaluation committee will make the final recommendation for selecting the vendor. All recommendations are subject to the approval of the IT Director and the EGPAF Executive Leadership Team.

6) FOUNDATION RESPONSIBILITIES:

EGPAF will provide working space and internet connectivity within the EGPAF offices in Washington, DC. At its sole discretion, the organization may arrange remote connectivity at Vendor's request. EGPAF has offices in various locations with Internet connectivity and the winning vendor can work from any agreed location but EGPAF prefers the Washington, DC Headquarters location.

7) LOGISTICS:

The services under this contract will be performed primarily in the Washington, DC office. Travel to any other EGPAF office must be approved by EGPAF.

8) KEY CONTRACT TERMS:

The anticipated contract type is a Time & Materials price. Unless stated otherwise in the statement of the work, the Contractor is responsible for delivering the final product as per the signed off functional specifications without any additional further alteration to the final contract signed between EGPAF and the Contractor.

All deliverables provided to the Foundation must be furnished for the use of the Foundation without royalty or any additional fees.

All Materials will be owned exclusively by the Foundation. Contractor will not use or allow the use of the Materials for any purpose other than Contractor's performance of the Contract without the prior written consent of the Foundation.

9) EVALUATION CRITERIA AND SUBMISSION REQUIREMENTS:

The Foundation will accept the proposal that presents the best value. All proposals will be evaluated against the following Evaluation Criteria. Each proposal must contain the items listed in the Submission Requirements column in the following chart. Please submit your Submission Requirements in the order that they appear below.

Evaluation Criteria	Submission Requirements	Weight
1. Past performance of similar work	<ul style="list-style-type: none"> Three (3) references are required including the samples of the works done. References should consist of projects of a similar scope and complexity. The reference contact information shall include the customer name, start/end dates of the project, customer email address, street address, telephone number, a description of the services provided and timeframe of the project. (20%) CV/Resume of proposed individuals to work on this project and two (2) references per individual. (10%) 	30%
2. Contractor's proposed process and approach to meet our needs efficiently.	A written detailed proposal explaining the process and methodology to be used during the implementation of the project. Technical approach – 10% Methodology – 10% Work plan – 10%	30%
3. Technical Approach	Well-developed workflow per the specifications provided by EGPAF (workflow concept, explanations, interpretation of the concept and overall final product functionality)	20%
4. Time & Materials Price	Fixed hourly rates per each category of labor to be performed; actual cost of materials.	20%

10) PROPOSED TIMELINE:

DATE: Monday, February 3, 2020 – Release of RFP

DATE: Friday, February 14, 2020 – Submission of Contractual and Technical Inquiries. Send all inquiries to: Cathy Colbert, Sr. Awards & Compliance Officer at ccolbert@pedaids.org.

DATE: Friday, February 21, 2020 – Question and Answer Response Document posted on EGPAF website at <http://www.pedaids.org/pages/contracting-opportunities>.

DATE: Friday, February 28, 2020 - Completed proposals must be delivered electronically by the deadline mentioned on page one to: Cathy Colbert, Sr. Awards & Compliance Officer at ccolbert@pedaids.org, with a “cc” to Larry Foxman, Sr. Knowledge Management Analyst, lfoxman@pedaids.org.

DATE: Monday, March 9 – Tuesday, March 10, 2020 – Possible interview period with selective candidates, on-site or online.

DATE: Friday, March 13, 2020: – Final decision announcement and Bidders notified

DATE: On or about Friday, March 20, 2020: – Contract execution and Services begin.

Please note it is our best intent to comply with the above timeline but unavoidable delays may occur.

No phone calls please.

11) ADDITIONAL INFORMATION

All proposals and communications must be identified by the unique RFP# reflected on the first page of this document. Failure to comply with this requirement may result in non-consideration of your proposal.

Any proposal not addressing each of the foregoing items could be considered non-responsive. Any exceptions to the requirements or terms of the RFP must be noted in the proposal. The Foundation reserves the right to consider any exceptions to the RFP to be non-responsive. Late proposals will be rejected without being considered.

This RFP is not an offer to enter into agreement with any party, but rather a request to receive proposals from persons interested in providing the services outlined below. Such proposals shall be considered and treated by the Foundation as offers to enter into an agreement. The Foundation reserves the right to reject all proposals, in whole or in part, enter into negotiations with any party, and/or award multiple contracts.

The Foundation shall not be obligated for the payment of any sums whatsoever to any recipient of this RFP until and unless a written contract between the parties is executed.

Upon placement of an order, the vendor will provide the services within a specified timeframe. Rates/prices provided in the submitted proposal will be captured in the contract and fixed for the duration of the contract.

Equal Opportunity Notice: The Elizabeth Glaser Pediatric AIDS Foundation is an Equal Employment Opportunity employer and represents that all qualified bidders will receive consideration without regard to race, color, religion, sex, or national origin.

Ethical Behavior:

As a core value to help achieve our mission, the Foundation embraces a culture of honesty, integrity, and ethical business practices and expects its business partners to do the same. Specifically, our procurement processes are fair and open and allow all vendors equal opportunity to win our business. We will not tolerate fraud or corruption, including kickbacks, bribes, undisclosed familial or close personal relationships between vendors and Foundation employees, or other unethical practices.

If you experience or suspect unethical behavior by a Foundation employee, please contact Doug Horner, Vice President, Awards, Compliance & International Operations, at dhorner@pedaids.org or the Foundation's Ethics Hotline at www.reportlineweb.com/PedAids/

Any vendor/consultant who attempts to engage, or engages, in corrupt practices with the Foundation will have their proposal disqualified and will not be solicited for future work.