



**Elizabeth Glaser  
Pediatric AIDS  
Foundation**

*Until no  
child has  
AIDS.*

**REQUEST FOR PROPOSAL  
ON PREMISE SHAREPOINT ENVIRONMENT IMPLEMENTATION**

IN SUPPORT OF  
ELIZABETH GLASER PEDIATRIC AIDS FOUNDATION (EGPAF KENYA)  
Ariel House, Westland's Avenue, Off David Osieli Road, Waiyaki Way, Westlands

**Firm Deadline: (June 09, 2017)**

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## ***1. Introduction***

The Elizabeth Glaser Pediatric AIDS Foundation (hereafter EGPAF Kenya), a non-profit organization, is the world leader in the fight to eliminate pediatric AIDS. Our mission is to prevent pediatric HIV infection and to eliminate pediatric AIDS through research, advocacy, and prevention and treatment programs. For more information, please visit <http://www.pedaids.org>.

## ***2. Background***

EGPAF Kenya has over 200 staff who are implementing donor-funded programs in diverse locations in Kenya (Turkana, Nairobi, Kisumu, and Homabay)

In country, the head office is located in Nairobi. An enterprise network information technology infrastructure is set up on a virtual private network. A point to point connection on the VPN is set up between the four offices implemented on Sophos/cyberoam devices. (Nairobi-Kisumu-Homabay-Turkana) The field offices are on a dedicated 10Mbps fiber link while Nairobi office is on a dedicated 20Mbps fiber link.

The desired outcomes of the SharePoint implementation are: improve collaboration capability between departments, different program areas and different geographically dispersed teams; improve unstructured information management capabilities; support integration of tools and data specifically with MS Office and SharePoint-Project Server integration; and provide access to outside entities via a secure extranet site (e.g. for posting of RFPs, job adverts, etc.)

EGPAF Kenya is seeking a qualified vendor for the implementation of SharePoint Server 2016 (on premise). The vendor will design, build, deploy, document, and offer training services that will enable the organization to optimize its use of SharePoint as an intranet and extranet platform for all its internal operational departments and program areas.

## ***3. Product Requirements and Scope***

EGPAF Kenya intends to implement and host a Microsoft SharePoint system within its own data center. Elizabeth Glaser Pediatric AIDS Foundation is seeking proposals from vendors that have extensive experience working with Non-governmental organizations with all aspects of SharePoint implementation to implement the following scope:

*Details below, define SharePoint functional features required within the project scope document proposal by the service provider:*

### ***a. Project Management***

A project plan with dates and milestones shall be created by the vendor / service provider and followed throughout the engagement. The vendor/service provider shall work with a project manager from Elizabeth Glaser Pediatric AIDS Foundation to plan and schedule all work.

### ***b. SharePoint Design***

This will include but is not limited to the following sections:

### ***i. Functional Requirements Document***

The *Functional Requirements Document* submitted by the bidder should capture use cases for utilizing Sites, Content, Search, and Communities, high level site layout, branding and requirements for performance, capacity, security and availability. Search will include external files and/or databases.

The *Functional Requirements Document* should capture high level information concepts (e.g. Employee, Work Order, Delivery Method, Location, Policy, Procedure, etc.) 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 Elizabeth Glaser Pediatric AIDS Foundation Branding Standards, which will be shared with the winning vendor.

### ***ii. Governance Plan***

Elizabeth Glaser Pediatric AIDS Foundation has developed 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. Technical Architecture***

The *Technical Architecture* should define the hardware and software configuration necessary to satisfy functional requirements and conform to the Governance Plan, while minimizing ongoing technical support requirements.

### ***iv. Training Plan***

The Training Plan should identify the training necessary for successful Share Point system and site administration / user level training.

Elizabeth Glaser Pediatric AIDS Foundation, IT Department will review the training plans and, as needed and within reason, the vendor will make revisions until they are accepted by the department.

### ***c. SharePoint Build***

The vendor will develop and deploy all environments of the Microsoft SharePoint 2016 solution. The vendor will present the solution to the SharePoint Working Group, demonstrating the functionality documented in the *Functional Requirements Document*. When all defects have been resolved, and build artifacts are available, Elizabeth Glaser Pediatric AIDS Foundation will accept the solution.

### ***i. System Installation and Configuration***

With assistance from Elizabeth Glaser Pediatric AIDS Foundation IT staff, the vendor will install and configure the system. Please note that the Foundation has already acquired all the necessary SharePoint server license

## ***ii. System Configuration Document***

The vendor will document the details of the system configuration.

## ***iii. Test Plan***

When the Working Group provides initial acceptance of the solution, the vendor, in collaboration with Elizabeth Glaser Pediatric AIDS Foundation IT department, will develop a *Test Plan* document. EGPAF IT staff will execute the Test Plan and document defects. The vendor will be responsible for resolving defects.

## ***iv. 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***

Following acceptance of the SharePoint 2016 solution build, the vendor will guide preparation for and deployment of the production system.

### ***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 and deliver training for up to twenty (20) power users, who will serve as SharePoint champions for the entire Elizabeth Glaser Pediatric AIDS Foundation 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 two (2) IT staff tasked with SharePoint administration responsibilities.

### ***iii. Recommendations***

The vendor should provide a list of any “out of scope” implementation recommendations that they deem relevant/necessary to achieve the objectives of this project

*Details below, define SharePoint process requirements within the project scope:*

### ***iv. SharePoint Migration and Application Development***

As for the organizations’ existing document and web management infrastructure, the vendors / service provider will be required to provide the following.

### ***v. Site Migration Plan***

The vendor in consultation with Elizabeth Glaser Pediatric AIDS Foundation staff, will develop a site migration plan that encompasses all of the organization’s existing intranet content. EGPAF will provide additional information to the winning vendor regarding existing content.

## *vi. Develop Applications and Workflows Specific to the organizations requirements*

In addition to the implementation of the SharePoint infrastructure, sites, branding and migration of data into the environment, the vendor will be required to develop new SharePoint applications and workflows as outlined below.

- Design and implement employee schedule dashboards (staff availability/travel calendar with reporting options) Calendar Options for travelling staff, planned travel vehicle utilization and location specific information including destination and duration of stay.
- Meeting room bookings with Exchange Online option. The aim of this particular application is to provide a means in which the organization especially within the Kenya office to identify and utilize meeting rooms in a much more efficient way. The application is to provide a seamless manner of free time identification for all allocated meeting rooms and any resources associated with them e.g. Audio Visual equipment, boards, projectors etc. information on already booked resources will also be available for the staff members to ensure proper planning and evade conflicts. Management of the resources can be done automatically via the system calendar or through an appointed member of staff who'll be granted administrative rights to assign resources appropriately.
- Taxi and Travel request (including flight management) Application
  - Develop and deploy an application across all offices to automate taxi requisition, approval, taxi invoice tracking and reporting following all policies and guidelines within the organization.
  - Develop and deploy an automated Travel request, per diem approval request, expense reporting and travel reporting application as per policy guidelines.
  - Develop and deploy a solution that will allow the organization to manage the numerous flight requests made by staff members. The application will allow staff to key in information regarding their flights both local and international related to the organization and assist in reporting of the same details.
- Develop and automate staff contact list with details of each staff member and also 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. Develop an application to manage and send the requests to and from the employees with a dashboard that will allow the monitoring and reporting of key activities from the application.
- Develop an application to manage all meetings calendars and deliverables follow-ups from the meetings, for all meetings that have been formalized and institutionalized across EGPAF-Kenya Country Program teams. That includes executive leadership teams, Management teams, Technical team's meetings.
- Digitize an existing Gantt chart template for EGPAF Kenya meetings on SharePoint.
- Digitize an existing issue manager excel template on SharePoint
- Develop and document EGPAF Kenya site requirements, plan application sites (automation/workflows)
- Develop information management for EGPAF Kenya on SharePoint:

- Document Management.
  - Record Management
  - Digital Asset Library
  - Contribute in developing information management policies.
  - Develop and Document Library planning.
- Deliver a Helpdesk solution to be able to assist the ICT department in the efficient and effective delivery of service to its clients (entire EGPAF team). The application will deliver the following among other services
    - Ticket issuance and follow up on specific issues.
    - Knowledge base for solutions and common problem solving areas.
    - Document and list management for the ICT team.
    - Workflows for ticket management.
    - Delivery of reports which will be utilized to identify and improve on specific problematic areas.

### *e. Contractual Deliverables*

Deploy and Implement SharePoint 2016 within EGPAF on premise environment

#### **Deliverables**

Deploy and deliver the necessary prerequisites for the SharePoint Server 2016 environment including Web Front End (Application) and Back End Database, and hosting infrastructure.

- Install and configure SharePoint Server 2016
- Configure all the required Databases for the proper functioning of the system
- Configure all the required Service Applications
- Configure all the required Web Applications.
- Configure all the required site collections and sites
- Configure the necessary permissions and rights for the different users and groups within the organization
- 

Develop the following policies for the organization in line with their business and functional requirements.

- Information management policies
- Document Management Policies

Develop and deliver local intranet infrastructure which will be outlined based on the above descriptions. The intranet should have

- Intranet sites (subsites based on program/ operational and other specified areas)
- Document Management System for the organization and the different programs areas and departments within the organization
- Records Management System to manage storage, arrangement and archiving of the foundations records.
- 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 SharePoint development Environment to develop and host SharePoint Applications. Develop applications as follows

- Taxi and travel request application (it will incorporate a staff flight management add on).
- Helpdesk application.
- Asset Management (Inventory) application.
- Digital Asset Library.
- Meeting management (Calendaring) and coordination system.
- Meeting resource management (rooms, equipment etc.) to be integrated to Exchange Online
- Contact list (database) and instant messaging system for staff

Develop all documents required pre-and post implementation process.

- Software Requirements Specification Document



## Deliverables

- Deployment and Implementation plan.
- Post Deployment Technical Document.

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

- SharePoint Server 2016
- Administration on SharePoint 2016.
- Training for End User SharePoint 2016.
- Administration and end user training on the above-mentioned applications.

## ***Minimum Requirements***

All applicants are required to be registered and authorized to perform the scope of work in the place of performance. A copy of valid registration must be submitted with each proposal.

### ***4. Evaluation Criteria***

The Foundation will accept the proposal that presents the best value. All proposals shall 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.

<b>Evaluation Criteria</b>	<b>Submission Requirements</b>	<b>Weight</b>
1. Past performance of similar work including qualifications of key project personnel	5 professional references from similar past projects with phone and email contact information and one or more examples of prior similar work. CV/Resume of proposed individuals to work on this project and 2 references per individual	30%
2. Contractor's proposed process and approach to meet our needs efficiently	A written proposal explaining the process and timeline for implementation	30%
3. Total fixed price	Total fixed price for all activities including a fixed price per each of the deliverables	40%
<b>Total</b>		<b>100%</b>

*f. Proposed Timeline*

**DATE: May 29, 2017**– Release of RFP

**DATE: May 31, 2017** – Submission of Contractual and Technical Inquiries:

**Send all inquiries to [nairobiprocurement@pedaids.org](mailto:nairobiprocurement@pedaids.org)**

No phone calls please.

**DATE: June 05, 2017**– Question and Answer Response Document will be shared via e-mail with all bidders

**DATE: June 09, 2017** - Completed proposals must be delivered electronically by the deadline mentioned on page one to: **(Procurement & Logistics Manager, [nairobiprocurement@pedaids.org](mailto:nairobiprocurement@pedaids.org)**

**DATE: June 16, 2017:** – Final decision announced and Offerors notified

**DATE: June 23, 2017:** – Contract executed and Services begin.

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

***g. 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.

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.

***h. 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/consultants 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\[at\]pedaids.org](mailto:dhorner@pedaids.org) or the Foundation's Ethics Hotline at [www.reportlineweb.com/PedAids/](http://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

**Canvassing will lead to automatic disqualification**