REQUEST FOR PROPOSALS

SharePoint Deployment Services

DUE: January 9, 2014, 5:00 PM

By

Center for International Private Enterprise
1155 15th Street, N.W.
Washington, DC 20005

SUMMARY

The Center for International Private Enterprise, herein after referred to as "CIPE", is soliciting proposals to select a qualified vendor/consultant to provide SharePoint consulting services. The Vendor must have a proven record of accomplishment in deploying complex SharePoint projects while maintaining high levels of customer satisfaction. CIPE will be seeking qualified consultant(s) that have expertise with SharePoint 2013 and familiarity with business process automation and system integration. CIPE has recently purchased K2 blackpearl, a workflow software application, so we would prefer contractors that are familiar with this software, but it is not required. The contractor(s) must have the ability and time to teach and guide CIPE staff to complete the deployment. All work will be done on CIPE's premises with CIPE staff and consultant in partnership with the vendor.

Your company is requested to submit a Fixed Price proposal in response to this RFP. Please submit your proposal no later than 5:00 PM Eastern Standard Time on Friday, January 9, 2014. A proposal validity period of 90 days is required from the proposal due date.

This RFP includes a description of the scope of services, proposal requirements, and instructions for submitting your proposal. Failure to follow these instructions may result in rejection of your proposal.

BACKGROUND

CIPE is a nonprofit organization that strengthens democracy around the globe through private enterprise and market-oriented reform. CIPE is one of the four core institutes of the National Endowment for Democracy. Since 1983, CIPE has worked with business leaders, policymakers, and journalists to build the civic institutions vital to a democratic society. CIPE's key program areas include anti-corruption, advocacy, business associations, corporate governance, democratic governance, access to information, the informal sector and property rights, and women and youth. Roughly 60 staff members work out of CIPE's main office in Washington, DC with another 30 staff members located in CIPE's regional offices.

CIPE recently deployed a new Intranet utilizing Microsoft SharePoint 2013 as the platform. The new Intranet was purposely released with a limited set of capabilities. The initial SharePoint efforts concentrated on moving content from an HTML environment to SharePoint with a new information architecture and taxonomy. The organization planned to add/build additional functionality in later phases. CIPE now desires to expand the use of SharePoint to automate business processes with K2 workflow software. K2 blackpearl allows businesses to build and run business applications, including forms, workflow, data and reports.

OBJECTIVE

CIPE is seeking to extend its current use of SharePoint 2013 to include business process automation, system integration, document management, and document search. With this current expansion, CIPE desires to

- ✓ Reduce redundancy of documents and manual labor
- ✓ Minimize costs, manual errors, and inefficiency
- ✓ Improve and streamline business processes and communications
- ✓ Standardize document management
- ✓ Improve compliance and governance
- ✓ Apply document retention policy
- ✓ Improve sharing of information across systems
- ✓ Track business processes

CIPE is seeking a qualified Vendor that will partner with CIPE to achieve the following goals:

- Provide a cost-effective and high-quality solution for the deployment of SharePoint to support CIPE's document management and business process automation
- Use best practices that ensure consistency in approach, configuration and standardization across all CIPE's environments
- Perform a technical assessment of CIPE's SharePoint 2013 infrastructure and validate that it will support the automation of business processes and integration with various systems
- Guide CIPE's staff to complete SharePoint deployment
- Develop a central system to store, retrieve, and archive documents in SharePoint

It is very important for the contractor(s) to understand that they will be guiding CIPE staff in completing the work necessary for the deployment. It's also important to note that the CIPE staff and consultant who will be completing the work do not have experience with SharePoint Central Administration, so a contractor with training experience would be preferred but not required. CIPE will make the final determination of the work that needs to be completed based on the expertise of and recommendations from the contractor(s), and they will complete the work with hands-on guidance from the contractor.

STATEMENT OF WORK

The purpose of this document is to provide a scope of work for the SharePoint development effort that is to be contracted. It should be noted that CIPE will not require full deployment lifecycle support from the vendor but rather a more limited level of support. The scope will concentrate its effort on building a strong SharePoint foundation to support document management, business process automation, and system integration. CIPE would like to have the project completed by *February 27, 2014*.

SCOPE

The Vendor shall provide the services below:

- ¤ Primary consultant must attend the Introduction meeting, if he/she did not attend Interview
- ¤ Analyze existing SharePoint infrastructure, make recommendations for improvement to infrastructure to support CIPE objectives.
- ¤ Review and analyze existing information architecture plans ensuring a scalable information architecture and taxonomy that will support the needs of CIPE for this current phase of work as well as future phases. [See ATTACHMENT C & D]
- ¤ Review and analyze current plan for workstation/queue. [See ATTACHMENT E]
- ¤ Review users and groups permissions. Ensure appropriate set-up of users and groups.
- ¤ Provide a Findings and Recommendations document. This document will list the findings and recommendations gathered during the review of the infrastructure, information architecture, workstation/queue plan, and user and groups permissions.
- ¤ Work with CIPE to develop a project plan including tasks and timelines. This plan should include the improvements to infrastructure and information architecture and taxonomy, document migration from network to SharePoint, as well as creation of farms, site collections, sites, libraries, global settings and lists, webparts, and lists. Document management functionality such as versioning, sharing, and archiving should also be included.
- ¤ Lead CIPE staff in implementing approved project plan.
- ¤ Work with CIPE to perform User Acceptance Testing. The vendor will make recommendations for any functionality that is not performing as expected, and lead CIPE staff in making the approved corrections. Any configuration changes will then go through another round of user testing. User testing will be signed off by CIPE prior to putting SharePoint into production.
- ¤ Lead CIPE staff in the development of System Configuration and Administration documentation that covers the functionality implemented as part of this effort, as well as Governance and Back-up/Recovery plans.

The system documentation is an ongoing process throughout the scope of work, and can be completed after the February 27 deadline, if needed.

DELIVERABLES
- A strong SharePoint foundation to support document management and business process automation
- A project plan including tasks and timelines to complete this work effort.
- A scalable information architecture and taxonomy
- A central system to store, retrieve, and archive documents on SharePoint
- System Configuration and Administration documentation

TECHNICAL SPECIFICATIONS

Service provider:

- Main contractor must be certified as a SharePoint consultant and service provider by Microsoft. CIPE may make exceptions for contractors with extensive experience.

MEASUREMENT/ SUCCESS CRITERIA

- ✓ Work is completed in timely manner within required quality without entailing major re-work.
- ✓ Successful UAT test and sign off by CIPE
- ✓ Deliverables are completed in a timely manner

ASSUMPTIONS AND CONSTRAINTS

- ❖ Project staff resources, including external vendor resources, will be available when and as needed
- ❖ This SharePoint deployment will be implemented according to industry best practices.
- ❖ All work outside the scope of the project must be approved by CIPE prior to completion.
- ❖ This project addresses "internally facing" SharePoint sites.

SUPPORT

When the vendor is not at CIPE's headquarters office, the vendor shall respond within 24 hours to support calls Monday-Friday between 9:00am-5:00pm upon CIPE's request to provide the above services. CIPE expects the vendor to provide phone or in-person support for a minimum of 30 days after the project rollout for issues that are a result of an error made during implementation.

PROPOSAL SUBMISSION

Please submit your proposal no later than 5:00 PM Eastern Standard Time on Friday, January 9, 2014. All submissions should be electronically submitted to Terrie Moody at tmoody@cipe.org. A proposal validity period of 90 days is required from the proposal due date.

Each section of the proposal should be clearly and appropriately labeled. Each response to this RFP shall include the information described in this section and proposal requirements. Please provide the information in the specified order. Failure to include all of the elements specified may be cause for rejection.

If a Vendor submitting a proposal discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP package, the vendor shall immediately provide CIPE with written notice sent electronically describing the problem to the point of contact and request that the RFP be clarified or modified. Without disclosing the source of the request, CIPE may modify the RFP package prior to the proposal due date.

In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any amendment to this RFP is valid only if it is in writing. All addenda for this RFP will be distributed to all potential vendors.

The proposal should include:

- ➢ Cover Letter with the following information:
  - o Title of this RFP
  - o Name and Mailing Address of Firm (include physical location if mailing address is a PO Box)
  - o Contact Person, Telephone Number, and Email Address
  - o A statement that the submitting contractor will perform the services and adhere to the requirements described in this RFP, including any addenda *(reference the addenda by date and/or number)*.
- ➢ All information included in the Proposal Requirement section.

The proposal shall be signed by an official legally authorized to bind the contractor and shall expressly state that the proposal is valid for ninety (90) days from the closing date for the receipt of all proposals.

Failure to follow these instructions may result in rejection of your proposal. All inquiries regarding this RFP should be directed to the point of contact, Terrie Moody at tmoody@cipe.org. Proposers will be able to ask questions and request clarifications 24 hours prior to the deadline. CIPE cannot guarantee responses to communications made within 24 hours of the deadline. Responses to all questions will be sent electronically to the email address provided.

PROPOSAL REQUIREMENTS
Each response to this RFP shall include the information described in this section. Provide the information in the specified order. Failure to include all of the elements specified may be cause for rejection. Additional information may be provided, but should be succinct and relevant to the goals of this RFP.

The proposal should include:

- ➢ Firm's Qualifications and References – Describe your firm and provide a statement of your firm's qualifications for performing the requested services. Please provide specific details of your firm's experience with SharePoint 2013, integrating SharePoint with SQL databases and K2 workflow software. Identify the services which would be completed by your firm's staff and those that would be provided by sub-consultants or sub-contractors, if any. Provide a minimum of three (3) references for projects or services similar in nature and scope that your firm's team members have completed in the last five (5) years. Include brief descriptions of the projects, dates, client names and contact

persons' names, addresses and telephone numbers. A minimum of one non-profit reference is preferred.

➢ Qualifications of Team – Provide a brief summary of the role, qualifications and experience of each team member assigned to work on this project.

➢ Project Plan – Based on the available information and experience with similar projects, please provide a detailed discussion of your firm's approach to the successful implementation of this project. Include thorough discussions of methodologies you believe are essential to accomplishing this project and any major challenges to achieving CIPE's stated goals. Include a proposed work schedule to accomplish all of the required tasks, and identify the staff who would be assigned to each task.

➢ Budget – CIPE is seeking a fixed price proposal to deliver the services described in this RFP. The quote should be inclusive of all service charges and fees. Provide a total cost proposal for all products and services to be delivered, and a breakdown of costs delineated by tasks as described in your project plan. Include a schedule of hourly rates for all proposed staff/roles and the amount of time that each will be devoted to this project. A description of the pricing method, structure, and assumptions must be provided in such a way that the selection panel can gain a basic understanding of the basis and composition of the pricing response. Any costs for optional or recommended out-of scope tasks should be included with separate pricing.

➢ Exceptions – Describe any and all proposed exceptions, alterations or amendments to the Scope of Services or other requirements of this RFP.

➢ Competency of Proposers – Please indicate whether a client has ever terminated a contract with your firm for breach, and if so, please explain.

EVALUATION CRITERIA

CIPE staff will conduct an initial review of proposals for conformance to requirements. If a proposal fails to meet these requirements, the proposal may be rejected. CIPE will then review in detail all selected proposals from the initial review. Each proposal will be evaluated on experience and qualifications of vendor and proposed staff, ability to deliver services, content and quality of vendor's response, proposed plan, proposed cost, and references. In addition, and at its sole discretion, CIPE may determine and use any other relevant criteria.

During the evaluation process, CIPE reserves the right to request additional information and clarifications from proposers. Such information will be requested in writing to the specific proposer. This information will become a part of the original proposal submitted by the specific proposer and will be used by CIPE in evaluating the proposal and will not be shared with other proposers during the evaluation process.

SELECTION PROCESS

The two vendors that have submitted the best and most complete proposals may be invited to an interview. After the interview process, CIPE will make a selection from the two interviewed firms. CIPE reserves the right to make a selection after review of the proposals without oral interviews.

All proposers will be notified within two weeks after the execution of a contract.

RFP ENCLOSURES

ATTACHMENT A: PROPOSER'S CERTIFICATION

The following set of enclosures provide detailed information pertaining to CIPE's information architecture and Workstation plans.

ATTACHMENT B: CIPE'S SHAREPOINT AND K2 ARCHITECTURE
ATTACHMENT C: INFORMATION ARCHITECTURE & TAXONOMY
ATTACHMENT D: TAXONOMY & METADATA
ATTACHMENT E: SAMPLE WORKSTATION/QUEUE (NOT APPROVED FINAL)

Disclaimer
Submission of a response constitutes acknowledgment that vendor has read and agrees to be bound by such terms listed in the proposals.

CIPE reserves the right to make no selection if proposals are deemed to be outside the fiscal constraint or against the best interest of CIPE. Nor does this RFP commit CIPE to pay the costs incurred in connection with any response or to procure or contract for any services offered.

CIPE reserves the right, at its sole discretion, to reject any portion and all of the response or to modify the proposed scope, with or without reason. Omissions, evasions, alterations, additions or irregularities of any kind may constitute sufficient cause for rejection of a response without further consideration. CIPE reserves the right to negotiate any or all items with individual vendors if it is deemed in CIPE's best interest.

Attachment A

PROPOSER'S CERTIFICATION

I hereby propose to furnish the goods or services specified in the Request for Proposal (RFP). I agree that my proposal will remain firm for a period of up to 90 days in order to allow CIPE adequate time to evaluate the qualifications submitted.

I have carefully examined the Request for Proposal and any other documents accompanying or made a part of this RFP. The information contained in this proposal is true and correct to the best of my knowledge and is signed under penalty of perjury under the laws of the District of Columbia.

I further certify that I am duly authorized to submit this proposal on behalf of the firm as its authorized agent and that the firm is ready, willing and able to perform if awarded the contract. I further certify that this proposal is made without prior understanding, agreement, connection, discussion, or conspiracy with any other person, firm or corporation submitting a proposal for the same product or service and that the undersigned executed this Proposer's Certification with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

_____
NAME OF BUSINESS

_____
SIGNATURE

_____
NAME & TITLE, TYPED OR PRINTED

_____
MAILING ADDRESS

_____
TELEPHONE NUMBER

Attachment B

CIPE'S SHAREPOINT AND K2 ARCHITECTURE

Virtual Server

Server

K2 SharePoint Server
Server 2012 R2

K2 Dev SharePoint Server
Server 2012 R2

K2 Web Server
Server 2012 R2

K2 Dev Web Server
Server 2012 R2

Server10A – Server 2012 R2
SQL Server 2008 R2

Attachment C – Information Architecture & Taxonomy

PROJECTS

Proposal
- Submitted Proposals
- Accounting Questionnaires
- Risk Rankings
- Verifications

Implementation
- Donor Awards
- Grant Agreements
- Modifications
- Contracts
  - Verifications
- Monitoring
  - Financial
    - Financial Reports
    - IMPs
    - Interim Audits
    - Final Audits
  - Narrative
- Trip Reports

Reporting
- Semi-Annuals
- Quarterlies

Evaluation
- Final Evaluations
- External Evaluations

Closeout
- Letter of Closeout
- Match Waivers
- Closeout Narrative Reports

Green = Library

Red = Folder

Orange = Documents

OPERATIONS

Green = Library

Red = Folder

Orange = Documents

HR

Finance

Tech

Travel

Need Staff Expertise to Determine

Payment Request Documentation

Need Expertise to Determine Other Libraries and Documents

Possible Documents include:

Monthly Financial Reports

CIPE Invoice Form (from template)

General Supporting Documentation

CIPE Receipt Forms

Wire Forms

Price Analyis Forms (Procurement)

Field Office Monthly Financial Report

Field Office Monthly Advance Requests

Invoices

Travel Authorizations

Approved Itineraries

Additional Trip Approvals

War Risk Insurance

Expense Reports

This will include CIPE payment slips and payment acknowledgement notice (name undetermined)

This will include receipts, approved memos, credit card statements, signed attachment Cs, etc.

Incoming and outgoing invoices

Proposals

Library: Submitted Proposals

Content Type: Submitted Proposals

FIELD NAME
Proposal ID
Proposal Title
Region [use Global list*]
Country [use Global list*]
Donor [use EPIC list*]
Fiscal Year
In-house or Partner
Partner Name [use EPIC list*]
Partner Acronym [use EPIC list*]
Core Area [use Global list*]
Theme [use Global list*]
Approved
Donor Award ID [use EPIC list*]
Cost Center [use EPIC list*]
NED Identifier
Proposal Round/Submission
Archived
Archive Date

Allow Multiple Entries

Proposal will have multiple cost centers for field office projects--one for management and one for the field office

Library: Verifications

Content Type: Verifications

FIELD NAME
Verification ID
Organization/Individual Name [use EPIC list*]
Date Performed
Related Proposal
Related Accounting Questionnaire
Archived
Archived Date

Have one list for all partners, contractors, consultants, and vendors. Indicate type in list. Allow for multiple indications.

Library: Accounting Questionnaires

Content Type: Accounting Questionnaires

FIELD NAME
Accounting Questionnaire ID
Partner Name [use EPIC list*]
Partner Acronym [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Date Completed
Related Proposal
Related Risk Ranking
Archived
Archive Date

Library: Risk Rankings

Content Type: Risk Rankings

FIELD NAME
Risk Ranking ID
Partner Name [use EPIC list*]
Partner Acronym [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Date Completed
Risk Level
Monitoring Assignment [use Global list*]
Related Proposal
Related Accounting Questionnaire
Archived
Archive Date

Implementation

Library: Donor Awards
Content Type: Donor Awards

FIELD NAME
Donor Award ID [use EPIC list*]
Donor [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Fiscal Year
Archived
Archive Date

No Status, Award Period or Award Amount

Library: Grant Agreements
Content Type: Grant Agreements

FIELD NAME
Cost Center [use EPIC list*]
Project ID
Partner Name [use EPIC list*]
Partner Acronym [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Fiscal Year
Archived
Archive Date

No Status, State Date, End Date or Award Amount

Library: Modifications
Content Type: Modifications

FIELD NAME
Modification ID
Modification #
Cost Center [use EPIC list*]
Project ID [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Fiscal Year [for Mod]
Partner Name [use EPIC list*]
Partner Acronym [use EPIC list*]
Modification Type [use Global list*]
Modified Document [use list*]
Archived
Archive Date

Selection:
Contract
Grant Agreeement
Donor Award

Library: Contracts
Content Type: Contracts

FIELD NAME
Contract ID [on contract]
Cost Center [use EPIC list*]
Project ID [use EPIC list*]
Region [use Global list*]
Country [use Global list*]
Fiscal Year
Organization/Individual Name [use EPIC list*]
Archived
Archive Date

Have one list for all partners, contractors, consultants, and vendors. Indicate type in list. Allow for multiple indications.

No Status, State Date, End Date or Contract Amount

MY QUEUE (Example)

All documents—project and non-project related documents (such as unit documents)

MY TASKS	MY PROJECTS	MY DOCUMENTS	TEAMSITES	SEARCH

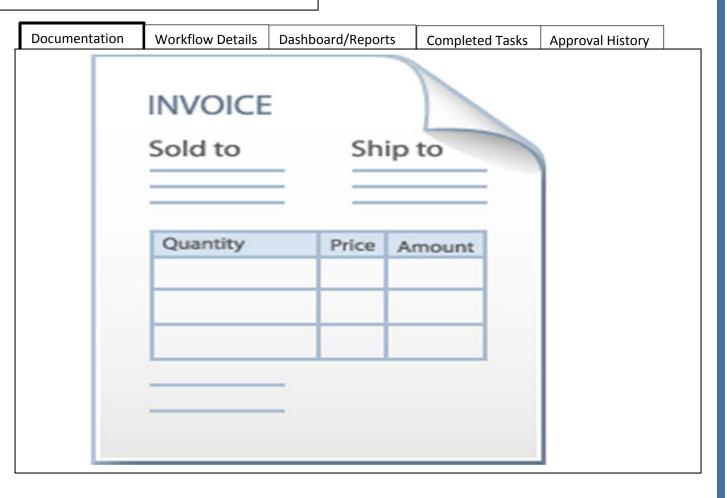| Task List	Date	Due Date	Status	Action
☐ Task 1	7/5/14	7/5/14	Overdue	Read and Pass
✔ Task 2	7/5/14	7/15/14	Current	Initial Approval
☐ Task 3	7/8/14	7/9/14	Current	Feedback Requested

UPLOAD DOCUMENTS
- Proposals
- Donor Awards
- Grant Agreements
- Modifications

ACTIONS
- Start TA
- Start Payment Request
- Add a Project

Documentation	Workflow Details	Dashboard/Reports	Completed Tasks	Approval History

Task 2

Date Created:

Payment Request Type:

Payee:

Payment Request Amount:

Purpose:

Supporting Documentation

Invoice #214

INVOICE

Sold to _____   Ship to _____

Quantity	Price	Amount

MY QUEUE

MY TASKS   **MY PROJECTS**   **MY DOCUMENTS**   **TEAMSITES**   **SEARCH**

My Projects

- ☐ 0113451-000-00
- ✔ 0113451-000-0A
- ☐ 0113459-000-00

Overview	Documents	Reports	Partner Monitoring	Project Tasks

Project ID: 0113452-000-00

Status: Active

Direct Budget: 100,000

Remaining Balance: 25,600

MY QUEUE

| MY TASKS | MY PROJECTS | MY DOCUMENTS | TEAMSITES | SEARCH |

What document are you searching for?

Pulldown: **Proposals**

Project ID: **In-house or Partner:**   **NED Proposal Round/Submission:**

Proposal Title: **Partner Name:** **[EPIC List]**   **Archived:**

Region: **[Global List]**   **Partner Acronym:** **[EPIC List]**   **Total Budget:**

Country: **[Global List]**   **Core Area:** **[Global List]**

Fiscal Year Submitted: **Theme:** **[Global List]**

Donor: **[EPIC List]**   **Approved:**

Donor Award ID: **[EPIC List]**   **NED Identifier:**

SEARCH 🔍

Proposal ID	Proposal Title	Region	Fiscal Year	Donor
10	The Jack and Jill of Africa	Africa	2011	NED
52	The Humpty Dumpty of Asia	Asia	2013	USAID

MY QUEUE

MY TASKS	MY PROJECTS	MY DOCUMENTS	TEAMSITES	SEARCH

What document are you searching for?   Pulldown: **Donor Awards**

Donor Award ID: [EPIC List]   **Award Period Date:**

Donor: [EPIC List]   **Award Amount:**

Region: [Global List]

Country: [Global List]

Fiscal Year:

Status: [Global List]

Archived:

SEARCH 🔍

Donor Award ID	Donor Award Title	Donor	Start Date	End Date
2014-006	2014 Core Grant	National Endowment for Democracy	1/1/14	12/31/14
2013-018	2013 Core Grant	National Endowment for Democracy	1/1/13	12/31/13

K2 FORM

Upload Proposal Form

Attach Proposal:

Proposal Title: **NED Proposal Round/Submission:**

Region: [Global List]   **Total Budget:**

Country: [Global List]

Donor: [EPIC List]

Fiscal Year Submitted:

☐ In-house ☐ Partner

Core Area: [Global List]

Theme: [Global List]

✓ Submit

✧ **Workflow will assign Proposal ID #**
✧ **Workflow will save document and assign metadata**

K2 FORM

Add Project Form

Select Proposal:

Project Type:

Cost Center #:

Partner: *(Autofilled from Proposal)*

Donor: *(Autofilled from Proposal)*

Related Donor Award ID:

Donor Award Start Date: *(Autofilled from EPIC)*

Donor Award End Date: *(Autofilled from EPIC)*

Project Acronym:

Project Title: *(Autofilled from Proposal)*

Region: *(Autofilled from Proposal)*

Country: *(Autofilled from Proposal)*

NED Identifier:

Regional Director: *(Autofilled from EPIC)*

Program Officer/Project Manager: *(Autofilled from EPIC)*

Program Assistant: *(Autofilled from EPIC)*

Management Funds:

Budgeted Grant Funds:

Link to Project "Rollup":

Fiscal Year:

Memo:

Block Time Sheet:

Core Area: *(Autofilled from Proposal)*

Theme: *(Autofilled from Proposal)*

✓ Submit

- ◇ **Workflow will assign Cost Center, Donor Award ID, NED Identifier to Proposal metadata**
- ◇ **Workflow will assign check mark to Approved field in Proposal metadata**
- ◇ **Workflow will push information to EPIC**