



REQUEST FOR PROPOSAL

RFP/11/019

Enterprise Content Management Solution – IFES Washington

From: Richard Twigg, Director, IT

Ref: RFP/11/019

Date: January 14, 2011

Subject: Enterprise Content Management for IFES HQ in Washington, DC

1. Introduction

The International Foundation for Electoral Systems (IFES) is seeking solicitations regarding an ECM solution for document management and retrieval. IFES is a 501c3 corporation that is an independent, non-governmental organization providing professional support to electoral democracy. Through field work, applied research and advocacy, we strive to promote citizen participation, transparency, and accountability in political life and civil society. More information may be found at www.ifes.org.

Please accept this RFP as an invitation to your firm to participate in this competitive bidding process.

2. Tentative Schedule

- The request for quotation will be released to the selected companies on January 14, 2011 before 18:00 EST.
- All questions and answers should be concluded by Friday January 28, 2011 before 17:00 EST.
- By Friday February 4th, 2011, 18:00 EDT **bids in soft copy format** must be e-mail to Jaime Acosta jacosta@ifes.org and Richard Twigg rtwigg@ifes.org. All quotes, documents and any correspondence related to the proposal shall be written in English.
- Notification for this award will be done after February 10th, 2011.
- Service delivery date: TBA in the award.

3. Technical

- **Scope of services Compliance and Deviations sheet:** Any departure from the provisions of the scope of services shall be disclosed at the time of the bid. Only deviations approved in writing before award of contract shall be accepted. In case of no deviations, for clarity please state 'no deviations'.
- **Qualifications:** The Bidder shall furnish evidence of its status as qualified Supplier. In order to prove this, the Bidder must submit the following documents in the bid:

a. Company profile.

b. Details of years in business: The bidder must document having a minimum of 5 years experience in ECM and SharePoint.

c. Financial details: The eligible bidder must include certified report in the form of Balance sheet which should include the annual turnover, annual profit and company's own capital, and demonstrate a sound financial standing.

d. References: The bidders must provide previous completed projects for past one year.

All submittals shall bear seal/marking/signature of bidder and IFES may request additional supporting documentation.

After receipt of bids, IFES reserves the right to request any additional information or seek clarifications from the bidder to ascertain responsiveness of offers received.

4. Bid Evaluation Criteria

An IFES Selection Committee will then consider the various bids. It may contact selected companies in order to clarify details and will then proceed to a decision on the most appropriate. IFES seek the lowest priced, technically compliant and fully responsive offer.

The evaluation will be based on the following criteria(s):

- Qualification of the bidder
- Compliance with Scope of Services
- Delivery Time
- Price

Each piece of criteria will be graded as follows:

Evaluation Criteria Grading	No of Points
Exceed Expectations	2
Meet Expectations	1
Do Not Meet Expectations	0

This project is funded by USAID; therefore, a competitive price is pursued and companies are encouraged to consider this when submitting initial information and/or bids for the participation in this event.

The contract for the project will be between IFES and the company. This contract will be negotiated immediately upon the selection bidding process.

5. Price schedule form

1. Prices shall remain valid for a period of 90 days from submission of the bids.
2. All costs/unit prices must be exclusive of customs, taxes and duties.
3. The Scope of Service described in **SECTION 6** shall be considered an integral part of this RFP when submitting this price schedule form.
4. IFES will make payment of properly submitted invoices within Net 30 days following acceptance and satisfactory performance.

Must be duly completed by the Bidder and returned with the Bid. Supplementary information shall be attached according to the requirements herein.

Currency: USD

Ref	Description	UNIT	ESTIMATED QTY	Item Price (USD)	ESTIMATED Total Price ⁽¹⁾ (USD)
1	Software Costs	Initial Costs		\$	\$
2	Software Maintenance	Annual recurring cost		\$	\$
3	Consulting Hours	Cost/hour		\$	\$
4	Expenses incurred such as travel, lodging, meals, etc.	Total for project		\$	\$
5	Support after completion of project	Annual or cost/hour		\$	\$
6	Staff training costs to include classes, travel, per-diem.	Total Cost		\$	\$
7	Other			\$	\$
GRAND TOTAL					\$

(1) In the case of discrepancies between unit price and total price, the unit price will be taken as reference basis in the evaluation.

PS: This form should be signed and stamped.

Please write in handwriting the following statement "All costs/unit prices are exclusive of customs, taxes and duties"	Please write hereafter:
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Delivery time of the implementation of the Call Center: The expected delivery is 10 working days after the contract is signed.	Please confirm hereafter: - Calendar days
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Name of Bidder: _____

Authorized signature: _____

Name of authorized signatory: _____

Functional Title: _____

Date: _____

6. SCOPE OF SERVICES & BIDDER'S STATEMENT REGARDING DEVIATIONS

The Scope of service described below shall be considered an integral part of this RFP.

Background

Since its founding in 1987, the IFES has worked in more than 100 countries promoting democratic stability by providing technical assistance to enhance citizen participation and strengthen civil societies, governance, and transparency. Every IFES project is staffed by national and international staff while partnering with local organizations. With a staff of 130 in the Washington D.C. Headquarters office, 70 additional employees in the 25 remote offices, and local partner organizations, IFES requires an advanced Knowledge Management System to help it carry out its mission.

IFES uses SharePoint 2007 as its primary Knowledge Management System for integrating multiple services like Intranet, collaboration sites, and document management. Over time, the staff has had numerous complaints about the current environment (the IFES System); that is, a lack of standards, training, and utilization of advanced features. When outside of Headquarters, the staff encounters performance issues with long wait times for uploads and downloads, which is a major impediment to completing IFES's global mission.

Objectives of Evaluation

The current IFES System combines loosely connected applications and Websites to provide solutions such as collaboration and document management. The objectives of this evaluation were to audit the current IFES System, gather and identify requirements, and recommend methods for enhancing and upgrading the IFES System into a true Knowledge Management System. This includes:

- **Evaluation of the SharePoint Environment** – IFES currently uses SharePoint 2007 as its employee portal to provide Intranet and collaboration services, as well as document management solutions. The evaluation will include an overview of the current site portal structure navigation, taxonomy, and search capability and recommendations for features to compliment/enhance the proposed solution.
- **Considerations for Travelling and Remote Workforce** – IFES's mission takes its employees into developing countries with low-bandwidth infrastructure. However, the IFES staff still requires access to data and collaboration services as they travel to these remote field offices. This evaluation will assess how well the current system meets these needs and make recommendations to accommodate these users through an improved distributed infrastructure and/or use of synchronization software.
- **Ease of Use** – This evaluation will propose solutions to make it easy for staff to save documents into the new Knowledge Management System and make it easier to retrieve and access documents using a search interface.
- **Training** – This evaluation will appraise the current training program and propose new training mechanisms using cross-disciplinary layers with multiple educational approaches to teaching Information Technology (IT) staff, power users, and end users.

- **Records Management** – IFES maintains a record center with hardcopy documents. This evaluation will propose solutions for integrating and migrating documents into electronic libraries, making them available online for users. In addition, IFES currently uses Symantec Enterprise Vault for e-mail archiving. A proposed solution will incorporate long-term data archiving features for e-mail and other forms of data storage.
- **Business Processes** – This evaluation will look at current IFES business processes related to the IFES System and recommend how to integrate solutions with other IFES business processes in the current environment. The evaluation will propose measures for modernizing and automating business processes through workflows and other tools.
- **Utilize Current Investments** – IFES has made a number of investments in infrastructure, training, and licensing (such as SharePoint 2007) for the IFES System environment. This evaluation will take these investments into account when proposing solutions and enhancements to the existing environment.

Scope of Evaluation

The current scope of this evaluation is to provide a comprehensive assessment of the current IFES System; including its processes, structure, user perception, and task activities. The evaluation will propose changes, upgrades, and other product additions based on IFES operational goals for its enterprise Knowledge Management System. This will comprise:

- Analyzing the current IFES System to clarify the IFES field user performance requirements and needs.
- Capturing elements of the IFES System's infrastructure to develop a baseline for the current implementation processes. This evaluation will then see if that baseline meets the IFES requirements for low bandwidth, high latency, and access for disconnected or remote users and will include expected minimum performance requirements.
- Identifying implications for upgrading SharePoint 2007 to SharePoint 2010. This evaluation will include analyzing hardware and software requirements for upgrading to adopt new features provided by SharePoint 2010 and other migration strategies.
- Evaluating the implementation of solutions for document management in conjunction with analyzing IFES's needs and requirements for future document management enhancements.
- Evaluating the potential for moving of the SharePoint infrastructure to hosted solutions based on IFES requirements and constraints, which were gathered through survey analysis and interviews.
- Evaluating usability requirements and possible improvements in IFES's SharePoint implementation, layout, design, and taxonomy. This will include branding of SharePoint for IFES specific use, including graphic artifacts, icons, and design layouts to enhance end-user usage and navigation of IFES SharePoint features and information.

Evaluation of Current IFES System

User Perceptions

On October 21, 2010, the Assessment Team conducted interviews at the IFES Headquarters to obtain an understanding about what users thought of the current IFES System. In each interview, participants were asked to provide feedback to a questionnaire, which had been sent to IFES on October 15, 2010. The questionnaire focused on what the users thought needed to be addressed in the current system and encouraged input to convey any specific processes they would like to see implemented in a Knowledge Management System. Survey results uncovered a majority of IFES employees disliked the current IFES System, and were open to significant modifications to the current environment. They indicated they needed a Knowledge Management System that people could access and navigate more easily, and they wanted a better check-in and check-out process with consistent naming conventions, and a better search capability.

Many users felt the culture of the organization needed to change in order to utilize any Knowledge Management System. There needed to be more standardization and better compliance before any knowledge management solution could become more useful. It was revealed, many people actually refused to use the current IFES System, and only saved documents to their default drive or desktop, and considered it “optional” to store documents in the SharePoint portal. This point unveiled a lack of adoption, which was reinforced by the perception that even management was reluctant to use the current environment.

The Assessment Team found multiple contributors to why employees disliked their current environment. The primary areas of concern include:

- **Mandatory Usage** — The organizational use of SharePoint is perceived as optional; there are no policies enacted to ensure processes and procedures are made mandatory. Management buy-in and support is needed to make this cultural shift, along with well documented Standard Operating Procedures (SOPs).
- **Standardized Practices** — Currently there are no standards established across Headquarters or field offices (e.g., naming conventions, organizational configuration management structures). As a result, even though information may be accessible through SharePoint, it was pointed out, it was difficult to find since no concrete configuration management plans had been adopted. A more defined structure would make the system more usable.
- **Version Control** — Documents are circulated via e-mail for review, resulting in several version control issues of the same document and no clear archived baseline. Thus, it was revealed that more consistent check-in and check-out procedures for use of the Knowledge Management System and clear guidelines for document control would address this issue.
- **Training** — Users felt that there is little training on how SharePoint is expected to be used (which was expected given that standards have not yet been defined). Once

policies and standards are defined and mandated, staff will need training to ensure they use the process controls and environment correctly.

- **Security** — Security validation/access roles were not defined. The Assessment Team found security authorization and access roles need to be defined and consistently implemented.
- **Technical** — No solidified configuration management processes have been implemented IFES wide. Each field office must have a file repository that can be mapped to a common network drive and accessed through the standard Windows Explorer, along with a well defined configuration management structure utilized within the IFES System environment.

Usage and Availability

Tracking and analyzing site usage is one of the most important facets in maintaining a good Knowledge Management System. In addition, site availability and performance are important components in meeting user demands and providing an effective system environment.

However, IFES currently lacks the structure necessary to regularly review and analyze its sites and their performance. As a result, the current IFES System does not meet users' expectations and the value of their sites to users is extremely low.

Intranet sites and portals need to drive users to the data they need, and sites that change their layout (or infrastructure) in response to user demands need to develop a stronger user base with more attachment to the system environment. IFES currently does not analyze its site usage reports, nor does it change the content or navigation of its sites to meet new user expectations. The general usage of the current SharePoint portal is below average for an Intranet as large as the IFES System environment. The usage reports for the IFES Divisions are listed in Table 2-1.

Table 2-1. IFES Division Usage

Business Unit	Avg Requests /Day(30 days)	Distinct Users (past 30 days)	Distinct Users Yesterday	Requests Yesterday	Destination In-Scope
Africa	6	22	6	10	No
Americas	5	10	3	17	No
ARC	4	12	4	10	No
Civil Society	0	2	1	1	No
Development	0	8	2	4	No
Europe & Asia	12	31	10	24	No
Executive	1	10	2	3	No
CW Library	0	3	2	6	Yes
MENA	2	13	4	5	Yes
Operations	0	5	1	1	No
Rule of Law	0	1	1	1	No
U.S. Election Services	0	2	1	2	No
Policies & Procedures	1	13	0	0	No
H.R. Support Site	39	101	18	54	Yes
Travel	9	50	4	7	Yes

As Table 2-1 indicated, six out of the 15 top-level sites showed less than one average hit per day over the past 30 days, which is far lower than most organizations using SharePoint for their Intranet system environment. Additionally, even highly requested sites like Europe and Asia only have roughly ten users hitting the site in a given day. This table and its supporting site usage reports show that users are not using the top level sites; meaning, users are going directly to team sites for usage. This habit usually occurs when users do not see anything of value on the top-level pages, implying that the content on those pages needs to change in order to attract the user audience.

Statistics for highly used sites are also somewhat below average. For instance, Europe and Asia had high hit rates over the last month, but much of that activity probably can be attributed to the Kosovo and Afghanistan elections. While it is good, site usage is increasing as workloads increase, but they are still below the norm for regular work schedules. However, the increased usage shows that users found value in using the SharePoint Intranet for its election activities.

One area where the SharePoint portal performed particularly poor was in the performance tests. Field users in remote locations consistently rated access to the site as extremely slow, if not unusable or accessible. The performance abroad does not meet the standards required, given IFES' mission. On the other hand, site availability has been very good given the small IT staff. Server down times are reasonable, given the equipment, staff, and maintenance that is performed in the off hours, which is in line with best practices.

SharePoint Portal Branding and Space Utilization

The IFES site is currently trying to utilize the SharePoint portal as a team site, collaboration tool, and as their Knowledge Management System environment. In general, team sites, because of the amount of control users have over them, have been the sites with the most effective layout and navigation. However, the current layout of top-level sites and the general master page is not sufficient to support a Knowledge Management System deployment at this time.

A successful Intranet should be considered a business system that represents and supports all areas of business solutions. Success of an Intranet site is determined by executive support, proper planning, and design, as well as user engagement and adoption. Almost all of these items are missing in the current IFES environment and the results are evident in the user surveys and site usage reports.

Intranets require user-friendly design with a logical navigational structure and Home page. Organizations that implement these features have users who quickly find what they want and are not distracted by unnecessary site clutter. Sites that organize information in a defined and documented structure often have more productive users.

IFES sites depart from industry best practices for consistency and branding as follows:

- The “look and feel” design is a canned SharePoint theme, which uses a minimal banner size that allows for optimal content placement on the page.
- The IFES SharePoint portal lacks a consistent and clean “look and feel” as a result of haphazard user customizations. Users customize their sites without regard for the whole Intranet design because there are no corporate policies or established standards with regard to site design or governance.

The following are specific findings that impact space utilization and usability:

- The IFES Home page has a quick launch left navigation, which unnecessarily mimics the global navigation.
- The Operations site and its sub-sites, like the Human Resources (HR) or Travel sites, are highly requested sites. Yet on global navigation, this appears as a subcategory under Business Units--making it more difficult for users to find what they are looking for given the amount of requests it receives.
- The content area contains Quick Site Links, which take up a large area of available content space, diverting important information into the scroll region.
- IFES In The News and IFES Headlines are found below the fold (ideal viewer focal point), which is not a best practice when presenting company news.
- The right content area does not contain informational content that represents most frequently requested information (as listed in the site usage report), and does not follow industry best practices.

With proper support and planning a successful Intranet provides wide spread, internal publishing of rich, well-structured information, vital for staff to access an organization's information assets from one centrally located site. The current IFES Intranet site maintains a weak navigational design, which is not clearly structured. The Intranet does not reflect what users want to see and does not offer users easy tools and structures to find information they want. Also, due to a bare design they feel no attachment to the site and no sense of ownership.

SharePoint Portal Taxonomy and Layout

The current site taxonomy and layout performs reasonably well, at a high level, but does not carry through to regional office "presence" pages or consistency in team sites. The taxonomy and layout of a site is the consistent naming, placement, and branding of objects to help users easily navigate the site and find information. Good taxonomy and layout provides intuitive navigation for users and establishes a set of standards for users as to the use the environment. The top level sites of the current IFES System are broken out by either regional office or field offices, and their supporting staff at Headquarters, or by functional office for back-office staff. This high-level naming structure provides a fairly intuitive structure for IFES employees; however, the presence pages (Home pages), which display purpose statements and useful links for a particular office to be used by the rest of the offices in the organization are not standard. Layouts can vary to a large degree, and the amount and quality of site content across sites also varies. Users have no standard or reliable expectations for these pages.

The problem is worse at the teaming level. No standard site templates or oversight is used when deploying new team sites, and there is a large amount of site sprawl and a wide range of structures that are repetitively used for the same purpose.

Additionally, there is a wide variety of terminology in use across the site, meaning that a user from one office cannot expect to know exactly what content on another site means. A project site in one office may refer to a completely different setup a structure than in another office. The amount of metadata captured for an item in one group may be far more or less than the amount of metadata captured for the same item in another group. This lack of configuration

management and consistent layout and naming structure for sites and control of data on the sites has led to distrust from users and a poor experience when using the current environment.

Governance and Security

Governance is a major area for improvement in the IFES SharePoint portal. Governance in the context of a SharePoint portal covers the use of roles and responsibilities and policies and processes to clarify ambiguity and manage the way users interact with the SharePoint environment to help meet company goals. It also impacts whether or not SharePoint is used. Some offices do not use the SharePoint environment at all, and store documents in paper form or other questionable file management Web sites.

The current environment has no governance board, no method for change and configuration management, and little training for regular users and power users. In addition, users do not thoroughly understand the policies and service agreements governing the portal. These governance problems affect a number of important factors, from user adoption to employee productivity, which decrease the synergy between IFES field teams and Headquarters. Implementing an effective governance strategy will help IFES in achieving its goal of promoting democratic stability through strong elections.

This section will also cover security aspects related to permissions on the site, security training, and security of IFES electronic data. Security in the SharePoint environment is done fairly well, but could be greatly improved. Permission structures are adequate, but training in SharePoint permission's best practices would improve the system environment. The biggest security gap comes from users who store their data outside of the "corporate" portals in unauthorized Web sites like Google Apps, Windows Live, and other online document storage sites. Users say they store information outside of the company portal because of the slow connection speeds and lack of training with SharePoint. In order to achieve an acceptable level of security for IFES data, user's concerns about the Intranet need to be addressed and a compliance verification program instituted to ensure data remains within the corporate portal.

Governance Structure

In order for governance of an environment as large as a corporate portal to work, it must have executive sponsorship through a standing body to make authoritative decisions with regard to policies, procurement, hardware or software changes, and ensure adoption exists within the SharePoint environment. IFES currently lacks that body.

These governing bodies are necessary in a portal environment because the portal is only as good as the value of its underlying content and ownership. Strong governance ensures that the portal delivers worthwhile content to its users by mandating content policies, security safeguards, and incorporating user demands to make the site easy to use and informative for users.

Currently the primary governing bodies for the SharePoint environment consists of the IT department and business owners that actively use their SharePoint sites. The IT department mandates governance policies through the configuration of the environment, as well as by reaching out to individual offices through training or announcements. This technical side of governance is done fairly well. Sites are laid out in a logical manner, backups of the content are done on a regular basis, and servers are scanned by anti-virus software. Some site leaders take an active approach to governance as well, like ensuring all of their sites follow a standard layout or by making sure certain naming conventions

are always used. However, these tasks represent only one side of governance. A more comprehensive view of governance includes ensuring best practices for the portal are distributed and security safeguards followed. It is important that the governance includes acting on change requests from users, and deciding major policies like records retention or site audit settings are carried out. Currently, IFES lacks the kind of inclusive governing group that is necessary to enact these policies and make sure they are followed.

Change Management

Change Management is an important part in a corporate SharePoint environment because Intranets need to be able to change fluidly to accommodate new business needs, while ensuring that the base of users that depend on the portal for documents and information see no interruption in service. If company portals fail to meet either requirement, then the user base becomes alienated and moves to other systems to store and access their information.

IFES does not have any standard way for users to request changes, nor does it have a method to document, and communicate changes to the SharePoint environment for users. Some users have contacts within the IT department that advise them on how to request changes; while others, especially field users, do not know how to submit request for changes. Likewise, many users do not know what features are available to them in the environment or how to interact with those features. Another change management problem IFES faces is that changes to the environment are not documented or managed in an accessible format. Users and administrators do not have a clear document that shows them how the environment has changed over time or why changes were made or whether they were appropriately authorized by the governance board. Most of this information is available only to the members of the IT department that implemented the change.

Security

In the IFES environment, security can roughly be broken down into areas actively managed by the IT department and areas where users have the most activity in setting permissions. Those areas that are actively managed by the IT department generally follow industry best practices and provide a good level of protection for IFES. However, the areas controlled by regular users, such as team site permissions or item and document permissions, do not follow industry best practices, which could result in the improper use of data.

While the IT department does implement many industry best practices, in regards to SharePoint administration, there are some areas that are within their area of responsibility that are not in line with standard practices. Auditing features for some site collections are not fully enabled to record when a user accesses or modifies data. Additionally, many libraries containing important data do not have versioning turned on. This means that overwrites data is potentially not recoverable. While these areas are relatively small, when compared to the wider array of security concerns that face the IT department, making changes to these processes would increase security in the system environment. Users, most likely because of a lack of training, do not follow a standard security schema to limit access to data on the SharePoint portal to other IFES users. Lower level sites often are open to all authenticated users or have the same permission structures throughout the entire site regardless of the type of data on the site. Additionally, the majority of sites have permissions assigned to individual users making it very hard to sort

through who might have access on the site. Another consequence of individual permissions, instead of assigning permissions through active directory (AD) security groups is that when a user changes positions, and therefore no longer needs to see certain data, it is extremely difficult to ensure they no longer have access to data not within their new area of responsibility.

While these security problems do not immediately open up IFES data to the public, they heighten employees' mistrust of the SharePoint portal and encourage them to store their data offsite in unauthorized document storage sites like Google Apps, Windows Live, or other sites. When these documents are not controlled within the boundaries of the corporate portal then IFES opens itself to risk of those documents no longer under IFES' control. Without proper control of these documents, IFES cannot access them for auditing purposes, backup and recovery purposes, or general informational purposes. This creates a gray area of misconception, IFES does have data and documents about a particular topic, but because the data is stored on another Web site it is not accessible or easily acquired, making it not actionable.

Training

The most common complaints about the SharePoint portal included: 1) It was unclear how to use it, or 2) User did not have the proper training to interact with the environment or use advanced features. In order to take full advantage of the investment IFES has made in SharePoint, users must be taught how to interact with the environment and how to use common features like library lists and search.

The current training options do not cover the type of training users require. In order to be effective with any tool, users require varying levels of training and a variety of access points. Both of these requirements are not sufficiently met in the current governance plan. All users do not have access to easily accessible in-page help tips, help Web sites, and FAQs. There are few prompts or training resources, such as Help icons or videos, or online training tools to assist users as they try and work on the site. Due to the lack of these self-service help tools, users do not always enter data or use an application correctly. IFES also does not have a robust and accessible instructor-led training program to help create power users who can then assist other teammates when questions arise. The training IFES does have is not adequately distributed to the field users. Instructors rarely visit field locations to train or retrain field users on how to use the SharePoint portal correctly or provide training for remote users. Field users also find the self-service help features to be minimal other than what comes standard in SharePoint.

The training that does exist usually only covers the technical aspects of the SharePoint portal and does not cover the IFES policies or best practices for using the portal effectively. Users can find out how to create a document library or upload a document, but, they are not informed users, taught about the best practices. For example, if informed on how to apply metadata to documents to categorize those users would not revert back to using folder structures for categorization. This effectively turns the document library into a file share instead of utilizing the full potential that the SharePoint portal offers as a Knowledge Management System.

Content Management

The IFES System environment does not take full advantage of SharePoint's enterprise content management features, which allows users to find documents or data they are looking for and easily setup new areas to store and interact with their data. Nor does it take advantage of SharePoint's ability to automate tasks, enforce policies to ensure information is kept current, and provide assurance that the authorized people can access that information. Effective content management requires standard practices for storing and tagging documents and other data with metadata. IFES has not provided a standardized manner in which its data is stored and is not taking advantage of the automated tools available in SharePoint to implement compliance. For example, data is not grouped by content type, but rather stored in generic documents and items.

A robust content management system uses many automated features to track changes to content and to make content more suitable to data transformation and especially information retrieval. The current IFES System does not use document versioning, approval routing workflows, or other available forms for document management in any standard and repetitive way. Some team sites may implement these advanced features, but few do. Currently, the IFES's major system for content management is its Microsoft Exchange e-mail system. Employees rely on their e-mail for search capability, version control, and routing. However, this system has many human interaction points where errors can be introduced, and is very tedious, wasting valuable time. Utilizing SharePoint tools to standardize the management and storage of documents and data will greatly assist IFES in implementing an enterprise Knowledge Management System.

Technical Evaluation

The overall SharePoint environment and its supporting infrastructure are generally in working order. However, some improvements can be made to ensure that the IFES System can host a critical business application. The current "farm" environment supports high availability only on the SQL database Tier. The Web front ends are not load balanced and do not support high availability on the Web.

The current environment meets minimum hardware requirements. However, there is not enough performance monitoring of the environment to sufficiently understand the current baseline performance and throughput. Once the baseline is established, throughput values can be monitored against the baseline. As usage changes and/or increases, the IT staff will be able to use this information to scale the base environment out in an effort to maintain service. With the exception of load-balancing technology, IFES has the required infrastructure in place to enable them to scale up and out of the SharePoint environment. IFES's VMWare clustered environment allows IFES to add additional servers to the environment. It also allows IFES IT staff to add resources to existing servers in an effort to scale up a server. IFES has enterprise Storage Area Network (SAN) storage in place, allowing them to add storage to the environment easily to meet storage demands in the environment. Further analysis of the supporting environments should be performed to ensure that resources are available (VMWare and SAN storage) to support the SharePoint scaling.

There are no additional environments to support a more mature deployment life cycle or to provide Continuity of Operations (COOP) in the event of a disaster. A Test/User Acceptance Testing (UAT) environment should be established that will enable new features and

functionality to be evaluated prior to production deployment. A robust disaster recovery environment or approach is critically missing.

Virus scanning software agents are not installed on all servers and there are no exception policies in place. This was done to prevent data risks from a scanner; however, an exclusion policy can ensure special handling for all files and processes with performance or data integrity risks.

As the environment grows to meet user demand, monitoring will become critical to ensure issues and performance factors in the environment are addressed in a timely manner. IFES is currently using System Center in the environment. System Center Operations manager, SharePoint, and SQL agents are not installed or properly configured.

Back-up agents are being used in the environment using Data Protection Manager. As the environment grows and to ensure proper records management, a technique for archiving data will become essential. IFES currently uses Enterprise Vault, but only archives data using Enterprise Vault Exchange, not SharePoint.

SharePoint environments must evolve to meet changing user demands. In an effort to keep the environment running as efficient as possible, close attention needs to be paid to the environment to ensure it is working properly.

IFES' Knowledge Management Requirements

The IFES Knowledge Management System supporting infrastructure must adequately and efficiently support the IFES mission around the world. The solution chosen must address the following issues:

- **Governance** – The solution must incorporate an effective governance plan and the chosen Knowledge Management System must enforce the IFES governance plans, policies, and standards. IFES should implement a new enterprise Knowledge Management System with a detailed governance plan to promote and enforce policies, as well as manage changes to the environment. IFES should setup a governance board that has executive backing and power to make and enforce decisions. This board should include members from the different IFES organizations to represent their member's interests as change requests to the portal occur.

A good governance plan lies at the heart of getting the user's buy-in in order to build and maintain a successful Knowledge Management System. Without a governance plan, best practices will not be enforced, sites will not be managed in a standard manner, and ultimately users will turn to other systems for managing their data.

- **Content Management** – IFES must support user's needs to access information needed in a most expedient, consistent, and intuitive manner. The solution must also provide the most effective management of information to reduce unnecessary duplication and preserve the most current version content. IFES should take greater advantage of SharePoint's enterprise content management features to allow users to find documents or data they are looking for quickly and easily setup new areas to store and interact with their data. In addition, the new environment should take advantage of SharePoint's ability to automate tasks, enforce policies to ensure information is kept current, and that only the appropriate people can access that information.
- **Performance and Availability** – The IFES System environment (applications and content) must be readily available to IFES users under a variety of restrictive conditions (e.g., low latency, low bandwidth). The current environment is too slow and too cumbersome to be of use to field users and has significant overhead at Headquarters. Network latency needs to be reduced in order for users to be productive on the network portal, especially for field users. The IFES servers will need to support expanded usage of robust workflows, searches, and document management processes placed on the servers. The new system should deliver these services without any degradation in the current quality of service.
- **Usability and Training** – As IFES implements its new enterprise Knowledge Management System, it must remain keenly aware of how end-users will perceive the new portal. Key elements in making the site intuitive and easy to use are consistent communication, layout customization, and other portal/Web design best practices. The training is important to

address any new features and to enable users to adopt new technology, governance policies, processes, and standards.

Constant and effective two-way communication is the most important element in increasing the usability of the site. IFES needs to consistently get the feedback from users and advertise new training features to build a dynamic and responsive portal environment. Additionally, the layout and design on all top level pages, as well as frequently visited pages, should be carefully planned to allow users to easily find what they want. IFES will need to more thoroughly analyze statistics available in SharePoint to obtain usage statistics in order to customize the layout in order to make it the most beneficial to the end user.

Finally, IFES needs to ensure that it has a variety of training materials about the new systems and policies that govern them. These training materials will help all users use the site correctly and productively.

Name of Bidder: _____
Authorized signature: _____
Name of authorized signatory: _____
Functional Title: _____
Date: _____

PS: This form should be signed and stamped.

7. Communication

Technical communication with IFES with regards to this request for quotation must, until otherwise notified, be directed to Richard Twigg (+1 202-350-6720, rtwigg@ifes.org). Procedural questions may be directed to Jaime Acosta (+1 202-350-6816 jacosta@ifes.org).

This request and any following dealing on this matter are confidential and shall not be disclosed to any third party.

IFES reserves the right to accept or reject any proposal, and to annul the solicitation process and reject all proposals at any time prior to award of contract, without thereby incurring any liability to the affected companies or any obligation to inform the affected companies of the grounds for such action.

Schedule “A” Notice of Intention

RFP/11/019

NOTICE OF INTENTION REQUEST FOR QUOTATION

From:

[VENDOR ORGANIZATION NAME]

[AUTHORIZED REPRESENTATIVE]

[TELEPHONE NO.]

[FAX NO.]

[E-MAIL]

Please state your intention with regard to the Request for Quotation RFP/11/019 by selecting one of the following:

☐ Intends to respond to this IFES Request for Quotation

☐ Does not intend to respond to this IFES Request for Quotation

TO:

International Foundation for Electoral Systems

Jaime Acosta, Procurement Manager

1850 K Street, NW

Washington, DC 20006

Tel: +1 202.350.6864

Fax: +1 202.350.6701

End of Request