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Call for Proposals: Implementing Microsoft SharePoint

1.0 About CIVICUS

CIVICUS: World Alliance for Citizen Participation is one of the leading and most diverse international civil society networks, with members and partners in more than 100 countries and a staff of 35 people from over 20 countries (most located in its Johannesburg, South Africa office with several working overseas). It implements a range of programmatic activities focusing on strengthening civil society and its role in governance and development worldwide. It also serves as a convener of global civil society leaders through its annual World Assembly.

2.0 Our needs

CIVICUS is looking to develop a comprehensive intranet and knowledge management system using Microsoft's SharePoint 2010 and associated software including:

- Microsoft Exchange Server 2010 (email)
- Microsoft Project (Project management)
- Microsoft Lync/Communication Server (IM Chats, Group chat, VOIP and conference calling)
- Visio (on-going work flow designs)

CIVICUS is seeking proposals from consultants to implement this solution between August and October 2011.

The Proposal must cater for the following set of requirements as well as additional requirements in the appendix and any other requirements you may consider necessary in your experience in implementing such systems(CIVICUS will obtain all software licenses and your proposal need not cover the cost of obtaining these):

2.1 Setup, configuration and migration of data onto SharePoint

The consultant is expected to setup the SharePoint server and all associated software on our servers located within our offices in Johannesburg, configure to meet our stated needs and migrate all users' accounts and resources from the Linux servers to the SharePoint servers.

Once complete, all staff will have access to their work files and all resources associated to their profiles on the Linux servers local within the office and remotely from anywhere in the world.

2.2 Specific configuration requirements

CIVICUS envisions the following features in the final implementation of Sharepoint for our intranet:

- 2.2.1 Individual Workspaces** - A personalised workspace for individuals to organise files, calendars, alerts, staff news feed and other work related resources. The individual workspace must be flexible and customizable by individuals. The Workspace must be setup such that it launches upon start-up of staff's computers and also available via

the browser should staff be outside CIVICUS House or using a non-CIVICUS computer – for this, a good level of security/authentication must be in place.

- 2.2.2 Knowledge Library** – A central knowledge repository capable of support for all file formats (multimedia) and allowing for easy organic access from every authenticated user's workspace, via enterprise wide search and via user initiated sharing.
- 2.2.3 Collaboration** – The capability for all staff (authenticated users) to create collaborative workspaces – much like is done within BaseCamp), share and collaborate on documents (with revision control – this currently lacking in BaseCamp), calendars and email contacts list/directory.
The collaborative workspace must provide for achievable instant messaging/forum.
- 2.2.4 Workflows** – Certain repeated organisational processes requiring single/multiple approval processes will be automated using workflows. Some identified processes include: HR forms and applications and Procurement process.
Staff with certain access privileges should be able to create and moderate simple workflows as may be required in future without needing to recourse to the consultant
- 2.2.5 Project Management** - Enable staff to track project's progress and health, allocated resources and budget.
- 2.2.6 Non-email communication:** Instant messages (one to one and group), VOIP (one on one, group/conferencing)
- 2.2.7 IPLF(Impact, Planning and Learning Framework)** - is CIVICUS' planning, monitoring and evaluation tool, currently consisting of a series of Excel and Word forms and templates that are completed on quarterly and annual basis by different units and projects and then manually review and combined. These are to be integrated with the Intranet in order to be completed and submitted online to allow the organisation to extract reports and track specific indicators. We have identified the need for workflows and a custom dashboards as tools for accomplishing this, thus we will require the consultant to have considerable experience in this regard.
- 2.2.8 Integration with civiCRM** - CIVICUS is implementing civiCRM (<http://civiCRM.org>), an open source constituent relationship management system (CRM) for tracking and managing its constituents. Thus we are keen on integrating both systems such that documents and resources can be shared seamless between the two and cross linked for example, all documents in the Knowledge library must be linkable to contacts in the in the CRM.

2.3 Training

The proposal must incorporate training for a core team at CIVICUS for the ongoing maintenance of the intranet.

3.0 Details your proposal must provide

3.1 Evaluation matrix: We are interested in knowing how you will implement Microsoft SharePoint and associated software to meet our listed needs and still leave it scalable in order to cater for needs that may arise in the future. We thus require that you create a matrix detailing which of the requirements you will configure Microsoft SharePoint to meet and which will require you to build or adopt custom/third part modules and/or components – we have identified above some software for specific task, feel free to incorporate those here or advise against their use.

Please use the format:

Main Requirement	Sub requirement	Does Microsoft SharePoint meet this out of the box?	Do you need to build custom modules or adopt existing 3rd party (non-Microsoft) solution

3.2 Support: State the level of support you are willing to offer and the associated cost.

3.3 Training: State the level of training, expected outcome(s), requirement(s) and cost.

3.4 Your experience: Please provide details of three implementations of Microsoft SharePoint you have completed in the last 12- 24 months. Detail your approach and outcomes and any lesson learnt. Please include for each reference and also say whether or not you can arrange a work through of these systems.

3.6 Additional information/advice: We are keen to learn from you any ideas, suggestions or thoughts that may assist us in ensuring maximum benefit of Microsoft SharePoint and associated products once complete.

3.7 Project schedule: Detailed schedule showing work break down, activity sequence and dependencies and key milestones.

3.8 Itemised project cost: An itemised project cost showing details of associated cost to each identified activities/milestones.

3.9 Method of submission: All proposals must be submitted by email to: proposals@civicus.org. Hardcopies will not be accepted.

4.0 Note

CIVICUS is eligible for Microsoft products at a reduced rate available to non-profit organisations via SangoTech in South Africa and TechSoup in the USA. As such, the cost of procuring the required licenses will be done separately to this proposal.

5.0 Key dates

5.1 Request for additional information: Our staff will answer all questions relating to this call for proposal between 2:00pm and 4:00pm till Wednesday 27 July 2011

5.2 Submission deadline: All proposals must be submitted on or before 10 August 2011

6.0 Miscellaneous:

- Only consultants whose proposals are short listed will be contacted
- This document is not a contract and should not be treated as such

APPENDIX 1

Requirements of the Intranet

The following provides more details on the requirements of the Intranet outlined in section 2.2 of the Request for Proposals. Recommendations from consultants on how to address these requirements are welcome.

Intranet structure

The intranet will serve as the main portal for CIVICUS staff collaboration and information sharing. It should include:

1. Homepage/Dashboard: The homepage for the intranet should include the following elements with the ability to be customised for individual needs:
 - CIVICUS News
 - Twitter feed and latest blog posts
 - Staff availability (i.e. staff who are on leave, travelling or sick)
 - Easy access to key intranet features such as email, knowledge library and chat facility
 - Organisational calendar
 - Latest from discussion boards
2. Department and Unit space: CIVICUS has 4 departments, 3 comprising of 2 units each and 1 department with 4 units. The intranet should provide department and unit space for collaboration and resource sharing including:
 - Easy access to key resources
 - Unit deliverables and timeline – ability to track progress and see upcoming deadlines
 - Team member calendars
 - Discussion board to share ideas and make notes
 - Ability to link to external resources to be shared with unit
3. Project space: CIVICUS has a matrix structure meaning that members of the departments/units are also group together into project teams. Space for project should incorporate the project management tools as well as similar features to the unit space.
4. Individual space: Staff should have individual space to see their calendar, email and task lists (amalgamation from different projects and their unit).

Knowledge Library

Multimedia knowledge repository with easy access, searching and sharing including:

1. A central information hub with sub-centres for project and unit information as well as organisational wide information hubs (brand centre, organisation policies centre, etc).
2. A standard set of tags to be managed by the knowledge management officer (including country, region, donor, thematic tags)
3. Ability of all staff to upload and file documents to the system with oversight by the Knowledge management officer
4. Multiple access levels with the ability to designate material to be accessible only to certain groups (i.e. Human Resources, Management, Resource Mobilisation). Ability to also set documents to read only.
5. A multimedia system that can capture copyright information, credits and captions as well as be tagged

Collaboration suite

A series of features to assist CIVICUS team members collaborate including shared calendars, email, email directory, chat facility, discussion forum and news feeds to share CIVICUS news.

1. Organisational Calendar – This is a SharePoint functionality that will enable staff to share current availability
2. Chat facility – This SharePoint functionality will be for much short term discussions (similar to skype)
3. Staff announcements/bulletin board - SharePoint must be an enabling environment to share sector, work and personal news
4. Discussion forum - This will be a SharePoint long term communication tool to address organisational issues or tackle hot civil society topics. Should be available at the organisation-wide level as well as for individual departments.
5. Email directory and personal profiles – for each staff member include contact details, areas of expertise, and type of work at CIVICUS

Workflows

Enable a flow of organizational processes via the intranet including:

1. Completion and submission of forms online
2. Approval of forms online
3. Prompts to relevant individuals for forms that require approval or have been finalised
4. Associate access to guidelines on completing the forms

The following workflows would be included:

- a) HR-recruitment, leave application, exit interviews, work reviews
- b) Office Administration – travel requests, reimbursements, meeting room bookings, request for repairs (IT/Maintenance)
- c) Planning and Learning – planning(IWP, DOP, POP), travel reports
- d) Resource Mobilisation – donor reporting deadlines

Project Management

Enable staff to collaborate on projects including

1. Identify project milestones and track progress
2. Project task breakdown and ability to assign tasks to individuals
3. Post and monitor upcoming events.
4. Track time spent on specific projects

IPLF

The Impact Planning and Learning Framework is CIVICUS' planning, monitoring and evaluation tool, currently consisting of a series of Excel and Word forms and templates that are completed on quarterly and annual basis by different units and projects and then manually review and combined.

The objective is to incorporate this process into the intranet including:

1. Online forms: Planning forms and evaluation reports to be completed and submitted online (includes: project operational plan, department operational plan, individual work plan, quarterly progress report and annual progress report) as well as capture success stories.
2. Creation of reports: Ability to extract reports based on the information submitted via the online forms. Data on/used to complete templates must generate snapshots of graphs, charts, trends that can be displayed on the intranet.
3. Indicators and Targets – SharePoint must be able to provide a diagrammatic summary to be share with staff of reports as a quick comparison between entities and across periods and describe progress made on each from one period to the other.
4. Prompts to indicate when forms need to be submitted and to the planning and learning unit when they have been communicated.