TERMS OF REFERENCE (TOR)
SharePoint Training

1. INTRODUCTION
The Digital Workplace for Supply aims at helping colleagues conduct their work smarter on an intuitive platform, to collaborate and exchange knowledge to improve Supply Chains for Children.

This improvement initiative is developed to meet the business needs of Supply in an O365/SharePoint environment, which is a new platform for Supply. Ensuring that proper skills are in place to roll-out the initiative is key to success.

2. PURPOSE
From Q4 2017 onward, UNICEF Supply Division is rolling out the Digital Workplace improvement initiative. The Digital Workplace is developed in O365/SharePoint which is the organizational platform of choice. UNICEF Supply’s Digital Workplace is hosted on the UNICEF global tenant and is configured as follows:

- Intranet component is developed on a SharePoint classic publishing site with some customized web parts
- Document management/collaboration component is to be rolled out using out of the box SharePoint modern TeamSites.
- Social/collaboration component will be rolled out on Yammer

One of the challenges of the project has been the roll-out from Microsoft of a new SharePoint framework (SharePoint modern). SD has decided to go with the modern experience for document management and document collaboration. The ongoing release of new features in SharePoint – some overlapping such as teams and groups – propose a challenge when it comes to knowing what to offer business units to accommodate their needs. At the same time, SD anticipates that the SharePoint modern offers out of the box features which will offer time-saving solutions to business units – such as the introduction of work flows on TeamSites.

To be able to offer the best possible return on investment of the Digital Workplace, key employees responsible for the DWP roll-out and maintenance are in need of more in depth training – particularly in SharePoint modern.

The project team in SD is encountering continuous requests from business units to set up TeamSites and provide solutions for specific business needs i.e. a site for trip reports, technical function group documentation etc. as part of the DWP roll-out. Most of these requests may be solved using a modern SharePoint framework. The project team wants to be sure that they are able to propose solutions to business units that fit the needs, are sustainable and fits in the wider context of the DWP so that we avoid siloed and short-term solutions to business needs for knowledge management and knowledge sharing. The project team also wants to ensure, that the foundational knowledge of SharePoint is present in SD – currently, only 2-3 people have undertaken some level of training and it is not felt that the training undertaken thus far has been comprehensive enough to ensure a firm and in-depth understanding of SharePoint (modern in particular) to be able to appropriately advise solutions. We need a firm foundation for a group of key people in the roll-out.

3. SCOPE OF WORK

3.1 The aim of the training and support consists of three parts: PART A, PART B and PART C:
**PART A**

**Part A: Super user/admin training**

The aim of **Part A: Super user/admin training**, is to have a core group of people trained with in-depth knowledge of SharePoint modern to support business units during the roll-out and respond to ongoing requests offering long-term and sustainable solutions utilizing in the best possible way the O365/SharePoint platform.

Therefore, the training programme should increase the participants’ ability to effectively respond to business needs and effectively support the roll out of the DWP, in particular the area of the DWP that is built in SharePoint modern:

- Understand the core functionalities of SharePoint online that are used within the DWP implementation.
- Gain in depth knowledge of the use of modern TeamSites and their web parts.
- Be able to advise business units on how to organize, present and work with content within the O365/SharePoint framework. This includes simple work flows and taxonomy.

**Part A: Deliverables Overview:**

The training package for Part A shall consist of the following:

- Deliver 3-4 days in-depth training for a group of up to 8 participants
- Supporting training material package
- Post-workshop individual feedback report

**Part A: Expected Deliverables in Detail:**

The outline below serves as an overview of anticipated areas for the training. Successful vendors passing stage 1 of the selection process will be invited to expand and discuss a customized solution to training needs with the project team.

It must be identified by vendor which of the tasks below are manageable and how within the SharePoint modern environment.

- An overview of SharePoint Online – key feature areas
- What to use when – overview of tools, onedrive, teams, group sites, onenote, forms etc
- Sites and site collections
  - Site types (modern and classic) – what exist and what to use when
- Security trimming and roles
  - Understand and work with permissions within the group, site, lists/libraries and items (for admins and users)
- Search
  - Managed metadata
  - Content type creating, management, settings
  - Search/filter for contents within teamsites, work with columns and content types to improve search
- Create, upload, edit, share and delete
  - documents
  - list items
  - calendar items
  - pages
- Understand the different web parts, their behaviour and possibilities to configure/modify them
- How to work with site collection images, metadata and renditions
- Create and configure document libraries and page libraries
- How to work with records
  - the records center
  - document IDs
o in-place records management
o working with document sets
o audit trails
• How to work with versioning, check in/check out, concurrent editing
• Menu/navigation
• Content types
• Create and configure/manage
  o views on lists/libraries
  o task lists
  o custom lists
  o alerts on lists and libraries
  o calendars
  o work flows

PART B

Part B: Focal point and end-user training

The aim of Part B: Focal point and end-user training, is to have all colleagues trained in working with documents on SharePoint sites and an estimated 15 web focal points trained to create and update content pages on the intranet. Support to using the modern TeamSites for specific programme/project needs is also part of the scope as outlined below.

Therefore, the training programme should ensure that
• all colleagues in UNICEF Supply Division have a basic understanding of how to work with documents in SharePoint (modern) and
• web focal points are able to fill in and update content pages on the intranet (SharePoint classic)
• all colleagues have access to training material for self-learning in the future

Part B: Deliverables Overview:

The training package for PART B shall consist of the following:
• Conduct 5 walk-in sessions and 2 webinars on key features of the Digital Workplace (open for all colleagues in house)
• Conduct training sessions with 18 business units on end-user features of the intranet and document management system and advise on which tool to use when
• Conduct 3 progressive sessions with content editors on intranet publishing
• Prepare material to support all training sessions which participants can use for future reference
• Prepare 10 how-tos and guidelines on key functionalities of the Digital Workplace
• Prepare a quick guide on "which tool to use when"

Part B: Expected Deliverables in Detail:

• Prepare and conduct face-to-face training for editors and end users of the intranet
• Prepare and conduct face-to-face training on how to use TeamSites for collaboration and document management
• Prepare and conduct webinars on key features of the Digital Workplace for Supply colleagues outside Copenhagen
• Prepare and conduct face-to-face training on tagging, classification and storing of documents.
• Prepare job aids on which O365 tool to use for what purpose
• Assess which guidelines and other how-to's are needed and prepare material for self-learning
• Prepare job aids and guidelines to support all training activities
• Support editors and end users on questions regarding collaboration within O365
• Support upskilling of Supply colleagues to be able to adopt the new Digital Workplace built in O365/SharePoint
• Ensure colleagues’ are able to keep learning and adopting on their own through guidelines, job aids and other relevant tools
• Be able to assess results of the training

PART C

Part C: Assessment of Specific Business Unit Demands, Solution Proposal and Training

The aim of Part C is to assess specific demands for work flows/sharing/collaboration of documents and content that can be met by the modern TeamSites.

Part C: Deliverables Overview:

Part C includes
• Setting up a TeamSite for a business unit to manage creation and sign off on Division Procedures. The TeamSite must include a simple work flow to enable a sign-off process for each Division Procedure. Each DP will also have an expiry/update date and a prompt upon expiry should be set up.
• Setting up a TeamSite for travel reports. The site must include content template(s) for travel reports, a simple work flow for signing off on the reports submitted and a searchable list with data on “location, dates, content, people met” on each trip.

Part C: Expected Deliverables in Detail:

For each of the three business units
• Meet up to 4 times to understand the concrete work flows.
• Solution assessment – short solution document for IT
• 2 hour training session the solution proposed
• Short documentation/how-to for the business unit

3.2 RESOURCES TO BE MADE AVAILABLE

In order to ensure that the training is completed successfully, the following are required:
• One/two full time trainer for the duration of the workshop
• Access to a test environment (alternatively access through the UNICEF tenant)
• Accompanying materials for the workshop session:
  o Support and reference material for participants covering the modules of the course
  o A copy of all Power Point presentations used during the workshop

Obs.: UNICEF will retain all rights and ownership to the Intellectual Property and training content developed for the purpose of this training programme.

3.3 PRE- AND POST- TRAINING ACTIVITIES

• Dialogue with the DWP project team to ensure the training has the right focus and modules are weighted correctly.
• Introduction by the DWP project team to the DWP developments including Functional Design Specifications and Technical Design Specifications.
• Possibility for participants of Part A to follow up on any unanswered questions via mail – with an anticipated amount of 10 questions.

4 BACKGROUND INFORMATION

• Where: UNICEF Supply Division, Oceanvej 10-12, 2150 Copenhagen, Denmark

• When:
  o PART A should be carried out in January 2018 and planned for 3-4 consecutive days.
PART B and C should be carried out throughout 2018. Details should be planned in coordination with the Digital Workplace project team. It is anticipated that the trainer may be onsite for a defined number of days but also be able to work off site for planning and preparations.

- **Who:**
  - For **Part A** the audience is Admin/super users from the IT and Communication units.
  - For **Part B** the audience is a) end users from all business units who need to have an understanding of the system and how to work with their documents on the TeamSites they have access to and b) an estimated 25 web focal points from business units who will need more in-depth training to upload content.
  - For **Part C** the audience is select users in a business units (often a group of 3-4)

- **Language:** All training (including all accompanying materials) is to be presented in English.

- **Methodology:** The training package shall include a combination of presentations and hands-on exercises. Video recording of individual presentations may be undertaken.

### 5 PROPOSAL EVALUATION

5.1 The following criteria will apply for the evaluation of vendor proposals:

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<th>TECHNICAL QUALIFICATION</th>
<th>BIDDER TO PROVIDE</th>
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| Overall Response (60 points) | • Training agenda for Part A  
• Training outline for Part A  
• Outline of sessions proposed for Part B  
• Outline of training material and how-to’s proposed for Part B  
• Method proposed to solve Part C |
| Understanding of tasks, objectives and coherence of response (20 points) | |
| Overall match between the ToR requirements and proposal for part A (20 points) | |
| Overall match between the ToR requirements and proposal for Part B (20 points) | |
| Technical Capacity (40 points) | • Evidence of similar assignments – Company’s profile & Expertise of assigned Consultant with general and specific experience on similar assignments in terms of scope  
• Examples of training material (sample) from similar assignment  
• Detailed CV of the proposed consultant or team for the assignment giving information about the following:  
  *Title / designation*  
  *Educational qualifications and professional*  
  *Past experiences on similar assignments* |
| Relevance of Company and Trainer’s experience with similar projects and as per required qualifications (20 points) | |
| Evidence of similar assignments – quality of training material sample (20 points) | |
5.2 Mandatory criteria:
- Ability to offer training in SharePoint Modern
- Ability to offer training and training material in English

5.3 Technical Evaluation Criteria / Technical Proposal

There will be a four stage evaluation process as follows:

Phase 1: Mandatory criteria – all bids that meet the mandatory criteria will go through the second phase evaluation. Those that fail will not be evaluated further.

Phase 2: Technical Proposal Evaluation: All those who receive a pass score of 70 (as per criteria in table above) will be invited for a final evaluation. Those that fail will not be evaluated further.

Phase 3: Evaluation of financial proposal

The final ranking of technically compliant proposals will be established based on 1) overall technical evaluation score: 70%; 2) overall financial evaluation score: 30%.

6 PAYMENT PROVISIONS
UNICEF shall, on fulfillment of the assignment, make payment within 30 days of receipt of Contractor’s invoice for the services. UNICEF is a tax exempted organization as such, all invoices submitted for services shall be exclusive of VAT and all taxes. All payment shall be made in US dollars.

7 PROJECT MANAGER:
UNICEF DWP Project Team will be responsible for the approval of all deliverables.