**Consultancy For SharePoint Knowledge Hub Restructuring & Optimization**

**Terms of Reference**

1. **About IPPF**

The International Planned Parenthood Federation (IPPF) is a global healthcare provider and a leading advocate for sexual and reproductive health and rights (SRHR) for all. Founded in 1952 at the Third International Planned Parenthood Conference by a courageous group of women, IPPF has grown into a movement of 120 autonomous members across 146 countries.

Our work spans comprehensive sex education, contraceptive access, safe abortion care, maternal health, and humanitarian crisis response. We take pride in being local through our members and global through our network, ensuring that integrated healthcare reaches those who need it most—regardless of race, gender, age, sex, income, or geographic location.

IPPF’s Strategy 2028: "Come Together" charts a bold new path to defend, protect, and promote safety, pleasure, and well-being in sex and reproduction while confronting policies and laws that undermine dignity and human rights. As an organization, we remain committed to accountability, impact, and solidarity, walking shoulder to shoulder with young people, marginalized communities, and those facing stigma and prejudice.

1. **Background to this Consultancy**

The SharePoint restructuring project is a key initiative under Pillar 4: Nurture Our Federation of IPPF Strategy 2028, aligning with the federation’s commitment to strengthening internal systems, improving knowledge management, and enhancing Secretariat efficiency.

* 1. **Current State & Key Challenges**

The existing SharePoint system lacks a cohesive structure, leading to inefficiencies in knowledge-sharing, document management, and collaboration. The platform is fragmented, with different regions and divisions operating in silos. This inconsistency creates barriers to access, searchability, security, and governance.

The restructuring aims to address these key challenges:

1. Fragmented Knowledge-Sharing – Lack of a centralized knowledge repository results in duplication, inconsistencies, inefficiencies and loss of institutional memory.
2. Inconsistent Technology Use – Different regions and divisions use varying versions of SharePoint, and some rely on non-standard platforms such as Google Workspace and Dropbox.
3. Inefficient Document Management – Weak metadata tagging, lack of standardized classification, and decentralized storage make document retrieval time-consuming and unreliable.
4. Security and Compliance Risks—There is no uniform governance framework for document retention, sensitivity labels, or access control, which increases data security vulnerabilities.
5. Limited Cross-Regional and Cross-Divisional Collaboration – Siloed systems prevent real-time knowledge exchange and best practice sharing across teams.
6. Governance Gaps – Lack of clear ownership and accountability structure for content curation, resulting in outdated or inaccessible information.

The goal of this initiative is to create a structured, user-centered knowledge-sharing platform within the Secretariat to ensure that institutional knowledge is effectively captured, preserved, and made accessible. By streamlining document management, improving accessibility, and integrating regional/divisional microsites, this project will enable the Secretariat to provide enhanced services and support to Member Associations (MAs).

1. **Key Components of the Initiative**

The system aims to achieve the following:

1. Digital Transformation – Establishing an intuitive document management system, upgrading regional/divisional microsites, and enhancing the Focal Point platform to improve access to institutional knowledge, resources, and data.
2. Internal Collaboration – Facilitating peer-to-peer learning, cross-team knowledge exchange, and streamlined communication to strengthen Secretariat operations and enhance engagement across teams.
3. Capacity Strengthening – Ensuring Secretariat teams have access to best practices, training, and shared expertise while equipping staff with improved tools for knowledge retention, decision-making, and information sharing.
4. Data-Driven Decision-Making – Strengthening evidence-based approaches by improving documentation and making data visualization and reporting mechanisms accessible to all Secretariat teams.

By embedding robust knowledge-sharing mechanisms within the Secretariat, this initiative will enhance organizational efficiency, institutional learning, and informed decision-making. Ultimately, it will contribute to IPPF’s broader strategic goals, ensuring that the Secretariat operates as a more agile, adaptive, informed, and efficient support structure for the Federation.

1. **Objective of the Consultancy**

The objective of this consultancy is to design, develop, and implement a centralised SharePoint-based knowledge hub that facilitates efficient knowledge-sharing, document management, and collaboration across the IPPF Secretariat. This initiative will establish structured workflows, improve governance, and ensure seamless access to institutional knowledge while integrating regional/divisional needs.

1. **Scope of Work**

The consultant/team will be responsible for:

1. Knowledge Hub & Document Management Development

* Establishing a centralized Knowledge Hub, integrating SharePoint Online with Microsoft 365 tools.
* Designing collaborative spaces within SharePoint to facilitate structured knowledge exchange across teams.
* Design a document management system for document storage, retrieval, and lifecycle management.
* Developing a taxonomy and metadata framework to standardize document classification and improve searchability.
* Deploying search optimization techniques for easy retrieval of institutional knowledge.
* Designing automated workflows for document approvals, versioning, and archiving to enhance efficiency.
* Implementing role-based access controls (RBAC) to enhance data security and governance.

2. Governance & Compliance

* Defining content governance structures, outlining roles and responsibilities for maintaining the system.
* Implementing data protection measures to ensure compliance with GDPR and global data security standards.
* Developing governance policies for document lifecycle management, ensuring appropriate retention, archiving, and disposal practices.

3. Training & Change Management

* Developing a comprehensive training program for Secretariat staff, ensuring effective platform adoption.
* Creating user guides, FAQs, and tutorial videos tailored to different user roles (admins, contributors, general users).
* Supporting knowledge champion network to promote adoption, i.e. by acting as internal trainers and providing peer-to-peer learning opportunities.
* Set up a dedicated 24/7 helpdesk for technical troubleshooting and continuous user feedback, ensuring real-time support across all regions.
* Conducting four global training sessions and four training sessions per region/division (virtual and in-person) to ensure Secretariat-wide adoption of the new system (number of trainings to be confirmed with consultant/team during the planning phase).

4. Post-Implementation Support & Optimisation

* Provide technical support and troubleshooting for the first 12 months post-implementation, including:
	+ Conducting periodic system audits to monitor adoption rates, usability, and performance.
	+ Implementing enhancements based on user feedback to improve system functionality over time.
	+ Maintaining a 24/7 helpdesk for technical support and troubleshooting
	1. **Phased Implementation Approach & Timeline**

The planning and implementation will be executed over 15 months, followed by a one-year support period for post-implementation support and optimisation.

Phase 1: Preliminary Planning (Months 1-3)

* Conduct stakeholder consultations and needs assessments.
* Develop a detailed implementation roadmap aligned with the Secretariat’s SharePoint restructuring plan, including system development and implementation, data cleanup and migration and training and change management.
* Establish governance structures, including global and regional/divisional implementation support teams.

Phase 2: Structural Design & Core SharePoint Deployment (Months 4-6)

* Design the overall structure of the knowledge hub and document management system
* Define site hierarchies, metadata models, and permissions structures.
* Deploy the global core SharePoint infrastructure, ensuring consistency across all teams.
* Develop and publish global training guides and conduct Secretariat-wide training sessions.

Phase 3: Regional & Divisional Customization Pilot (Months 7-9)

* Engage 2-3 regional/divisional teams to identify specific workflow requirements based on their needs.
* Develop and test customized workflows for regional and divisional needs.
* Execute data cleanup and migration and ensure data integrity.
* Conduct pilot testing with selected regional/divisional teams to refine the system.
* Develop customized training materials and conduct training tailored for each of the regional/divisional user groups.

Phase 4: Full Rollout & Adoption (Months 10-15)

* Based on the pilot, deploy regional/divisional sites for the other regions/ divisions.
* Execute data cleanup and migration and ensure the integrity of stored institutional knowledge.
* Test and refine the system through iterative feedback from users.
* Conduct comprehensive user training for administrators, contributors and end-users.
* Deploy the system on the remaining regions/divisions.

Phase 5: Post-Implementation Support & Optimization (Months 16-27)

* Provide technical support and troubleshoot system issues.
* Monitor adoption rates and address user concerns.
* Audit system performance to assess security and efficiency.
* Implement enhancements based on user feedback and evolving needs.
1. **Technical Requirements & System Architecture**

The consultant/team should ensure that the system meets the following technical requirements:

* Platform: SharePoint Online, integrated with Microsoft 365 tools.
* Security: Implementation of role-based access controls (RBAC) for secure data management.
* Automation: Development of automated workflows for document approvals, versioning, and archiving.
* Search Optimization: Enhanced metadata-driven search functionalities for fast document retrieval.
* Accessibility: Mobile and offline access capabilities.
* Integration: Seamless integration with existing IPPF platforms (e.g., MA Dashboard, the Secretariat’s visualization and reporting tool that has been developed on PowerBI).
1. **Expected Deliverables**
2. Project Brief – Summary of key findings from the needs assessment.
3. Project Proposal – Methodology, system architecture recommendations, data cleanup and migration strategy, data security and compliance framework, and training strategy.
4. Core System Deployment Plan – Blueprint for implementing the global and regional/divisional SharePoint structure.
5. Training & User Support Materials – User guides, FAQs, tutorial videos, training modules and 24-hour helpdesk.
6. Pilot Testing Report – Findings from regional pilots and recommendations for refinements.
7. Final Deployment & Rollout Report – Final report from full SharePoint launch across the Secretariat.
8. Roadmap for Future Enhancements – Strategy for long-term system sustainability and scalability.
9. **Reporting Line**

The consultant will report to the Project Manager and collaborate with:

* IT Team (integration, security, and compliance).
* Regional & Divisional Representatives (customization and localization of workflows).
* Leadership & Governance Team (oversight and strategic decision-making).
1. **Required Qualifications & Experience**

The ideal consultant/team should have:

* Extensive experience in the design, development, and restructuring of knowledge management systems for large, cross-regional organizations.
* Expertise in SharePoint customization, including Microsoft 365 tools, workflow automation, and enterprise document management solutions.
* Strong technical background in role-based access control (RBAC), security compliance, and GDPR/data protection regulations.
* Proven experience in user training, change management, and adoption strategies, particularly for large-scale digital transformation projects.
* Ability to translate complex IT concepts into clear, non-technical language for diverse stakeholders.
* Demonstrated experience working with large global organizations or NGOs, across multiple time zones and languages, preferably in a federated or decentralized structure with localized operations.
1. **Fee & Payment Terms**

The consultant/team will be compensated based on milestones tied to project deliverables. The budget will cover:

* Needs analysis and system design
* System development, data migration, and system deployment
* Training and capacity-building sessions
* 24/7 technical and troubleshooting support
* Post-implementation support and optimisation.
	1. **Payment Terms**

The fee shall be payable to the firm and linked to specific deliverables as per the following terms. The payment schedule is subject to change based on the work plan agreed with the firm. The anticipated budget for the implementation (Phases 1–4) is in the range of USD 120,000 – 160,000.

Please note that Phase 5 (post-implementation support and optimisation) will be implemented separately and should be quoted as a distinct line item in the range of USD 20,000 – 40,000.

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| **S.No** | **Phase & Milestones** | **Payment Terms** |
| 1) Phase 1: Preliminary Planning (Months 1-3) |
| i) | Signing the contract | 10% of consultant fee – Phase 1 (a) |
| Conduct stakeholder consultations and needs assessments. |
| Submission and approval of Needs Assessment Report |
| Project Brief & Project Proposal |
| Valid invoice |
| ii) | Develop a detailed Implementation Roadmap, including a Data Migration Plan | 10% of consultant fee – Phase 1 (a) |
| Establish governance structures, including global and regional/divisional implementation support teams. |
| Valid invoice |
| 2) Phase 2: Structural Design & Core SharePoint Deployment (Months 4-6) |
| i) | Design the overall structure of the Knowledge Hub and document management system | 15% of consultant fee – Phase 2 (b) |
| Define site hierarchies, metadata models, and permissions structures. |
| Develop and submit Content Governance Framework. |
| Valid invoice |
| ii) | Deploy the global core SharePoint infrastructure | 10% of consultant fee – Phase 2 (b) |
| Implement GDPR & Data Security Compliance Framework |
| Develop and publish global training guides. |
| Conduct 4 Secretariat-wide training sessions. |
| Valid invoice |
| 3) Phase 3: Regional & Divisional Customization Pilot (Months 7-9) |
| i) | Engage 2-3 regional/divisional teams to identify specific workflow requirements | 10% of consultant fee – Phase 3 (c) |
| Develop and test customized workflows for regional and divisional needs. |
| Deploy role-based access controls (RBAC) |
| Valid invoice |
| ii) | Execute data cleanup and migration | 10% of consultant fee – Phase 3 (c) |
| Conduct pilot testing with selected regional/divisional teams. |
| Develop customized training materials (FAQs, user guides, videos) |
| Conduct four training sessions (per region/division) tailored for the different user groups. (administrators, contributors, and end-user) |
| Pilot Testing Report Submitted |
| Valid invoice |
| 4) Phase 4: Full Rollout & Adoption (Months 10-15) |
| i) | Deploy regional/divisional sites for remaining regions/divisions | 20% of consultant fee – Phase 4 (d) |
| Execute final data migration. |
| Ensure the integrity of stored institutional knowledge. |
| Valid invoice |
| ii) | Test and refine the system through iterative user feedback | 15% of consultant fee – Phase 4 (d) |
| Conduct four training sessions (per region/division) tailored for the different user groups (administrators, contributors, and end-users) |
| Final Deployment & Rollout Report Submitted |
| Valid invoice |
| 5) Phase 5: Post-Implementation Support & Optimization (Months 16-27) |
| i) | System Audits & Monitoring Reports (Quarterly) | Total Fee (e) / 12 (Monthly instalment) |
| Address user feedback & system enhancements. |
| Provide technical support and troubleshooting. |
| Valid invoice |
| ii) | Develop Roadmap for Future Enhancements (Long-term sustainability plan) | Final milestone payment – Phase 5 (e) |
| Valid invoice |
| 6) System Augmentation (As Needed) |
| i) | Change request action taken | Total Fee as per invoice |
| Valid invoice (as per agreed effort estimation and fee) |

**Note:**

* IPPF would cover travel costs (i.e. only economy-class airfare or similar, including out-of-pocket expenses, whilst on travel as per IPPF’s travel policy) for one person to all locations to be covered as part of this assignment with prior itinerary approval from the single point of contact provided by IPPF.
* All other costs shall have to be borne by the Consultant.
* All payments shall be payable on submission and approval of the invoice along with the deliverable.
* Financial quote as per the desired format of the TOR needs to be provided in US$ only.
1. **Application Process**

Interested consultants/teams should submit:

* Technical proposal outlining the methodology, approach, compliance with RFP requirements, key milestones, and timeline (maximum 20 pages or 20 slides)
* Financial proposal in US$, using the prescribed format, with a detailed cost breakdown
* CVs of key personnel, including the proposed Project Manager, highlighting relevant experience and certifications (maximum 2 pages per CV)
* At least two references from past projects of similar scope, with confirmation that clients can be contacted if shortlisted
* Examples of previous work demonstrating expertise in SharePoint restructuring and digital knowledge management
* Signed self-declaration confirming the bidder has not been blacklisted by any government or non-government institution

*See Appendix 3 for complete technical and financial bid format requirements.*

* 1. **How to Apply**

Proposals (Technical and Financial) must be submitted via email to dmasara@ippf.org (cc: rsingh@ippf.org) in the required format (see Annex 3) **by 5 PM BST on 24th Oct 2025**.

* 1. **Contact Information**

For any questions regarding this RFP, please email dmasara@ippf.org (cc: rsingh@ippf.org)

**Annex 1: Additional Information on the Secretariat Structure**

**1. Secretariat User Base & Structure**

The SharePoint Knowledge Hub will support 325 users across the London office and six Regional Offices.

* 6 Regional Offices:
	+ Africa Regional Office (ARO) – Nairobi, Kenya and the sub-regional West Africa office in Abidjan, Cote d’Ivoire.
	+ Americas & the Caribbean Regional Office (ACRO) – Mexico City, Mexico, and Trinidad and Tobago
	+ Arab World Regional Office (AWRO) – Tunis, Tunisia
	+ East & Southeast Asia & Oceania Regional Office (ESEAOR) – Kuala Lumpur, Malaysia, and the sub-regional Pacific office in Suva, Fiji
	+ European Network (EN) – Brussels, Belgium
	+ South Asia Regional Office (SARO) –New Delhi, India
* 5 Secretariat Divisions with team members based out of the London office, regional offices and other locations:
	+ MA Development and Impact
	+ Finance & Technology
	+ People, Organization & Culture (POC)
	+ External Relations
	+ Directors' Leadership Team **(**DLT) & Director General’s Office

**2. Focal Point**

The Focal Point is the Secretariat’s existing knowledge hub but requires enhancements to align with the restructured SharePoint system.

**3. Migration**

* The amount of data to be transferred (from Google Workspace, Dropbox, and older SharePoint versions) will be confirmed during the needs assessment.

**4. Branding & Language**

* Official Languages: English, French, Spanish, Arabic, with additional language support as needed.
* Branding: Standardized IPPF interface with regional flexibility for logos and colours as per IPPF Brand Guidelines.

**Annex 2: Evaluation & Scoring Criteria**

Proposals will be evaluated based on the following criteria:

|  |  |  |
| --- | --- | --- |
| **Criteria** | **Weight (%)** | **Evaluation Focus** |
| Technical Approach & Methodology | 35% | Clarity, feasibility, and innovation of the proposed methodology; understanding of project requirements. |
| Relevant Experience & Expertise | 25% | Demonstrated expertise in SharePoint restructuring, digital knowledge management, and working with large, decentralized global organizations. |
| Team Composition & Qualifications | 10% | Skills, expertise, and relevant experience of key personnel. |
| Work Samples & References | 10% | Quality of past work, client feedback, and relevance to the current project. |
| Financial Proposal | 20% | Cost-effectiveness, budget clarity, and alignment with the project scope. |

**Annex 3: Technical and Financial Proposal Bid Format**

The interested party shall submit the bid as per the above Request for proposal. Bids not satisfying the technical evaluation criteria shall be rejected. The bids need to be prepared and submitted in the format provided below. Incomplete submission or non-adherence to the specified format may result in the rejection of the bid.

**Technical Bid Format**

The bidder will submit their technical proposal using the following technical bid format.

|  |  |  |
| --- | --- | --- |
| **#**  | **Particulars**  | **Details to be provided**  |
| 1.  | Bidder details  | Bidder should provide details of: * Bidding legal entity.
* Geographical presence and experience of the firm
* Service portfolio.
* Pool of skill sets available with the firm.
 |
| 2.  | Bidder should not have been blacklisted by any Government /Non-Government Institution  | A self-declaration in this regard shall be provided by the bidder and should be signed by the authorized signatory.  |
| 3.  | Past Relevant Experience of the Firm    | The bidder should provide the details of relevant experience (in the form of citations for similar work undertaken by the bidder) that best illustrates their ability to provide the services required as per the TOR. A minimum of 2 citations about similar client projects and references of work conducted must be presented.  The bidder should confirm that if the bid is successfully shortlisted, they will provide contact details for the clients and that they can be contacted for reference purposes.  |
| 4.  | Technical Approach & Methodology proposed for the project  | Bidder should provide an overall technical approach & methodology to cover minimum details in terms of the following: * Understanding of the project and its objectives.
* Overall approach and its responsiveness to the objective of the assignment.
* Methodology to be adopted.
* Project Plan.
 |
| 5.  | Proposed Solution Compliance Matrix  | Bidder will provide a compliance matrix that highlights the solution being proposed and complies with the key features of the solution presented in the scope of work and technical requirements of the RFPs.  |
| 6.  | The Bidder’s Project Manager should have at least 5 years of experience in  | Summary of experience in development and implementation of similar SharePoint projects undertaken in the last 5 years  |
| **#**  | **Particulars**  | **Details to be provided**  |
|  | development and implementation of similar SharePoint solutions.  |  |
| 7.  | Detailed CVs (maximum two pages per CV) of proposed Project Manager and other key resource/team members along with their roles/responsibilities.  | Attach documentary proof (detailed CV along with certifications) of the list of personnel to be deputed exclusively for the project, along with their qualification and experience. Please note that the Project Manager proposed shall be the single point of contact and shall not be changed without written approval from IPPF.  |

Proposals should not be more than 20 pages or 20 slides.

One week's intimation shall be given to the bidders prior to the date of demonstration / POC. No cost incurred by the Consultant related to the bid preparation, including preparation of demo or POC, shall be covered by IPPF.

**Financial Bid**

The Financial Bid for the proposal should be submitted by the interested bidders in US$ in the format presented below. The anticipated budget for the implementation (Phases 1–4) is in the range of USD 120,000 – 160,000.

Please note that Phase 5 (post-implementation support and optimisation) will be budgeted separately and should be quoted as a distinct line item in the range of USD 20,000 – 40,000.

 ***Implementation Cost – Include Consulting and Travel Fees***

|  |  |
| --- | --- |
| **Particulars**  | **Total Amount (US$) Excl. VAT**  |
| Phase 1 |   |
| Phase 2 |  |
|  |  |
| Total (a)  |   |

***Post-Implementation Support Cost (F4)***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **S. No.**  | **Resource Profile**  | **No. of Resources** **(i)**  | **No. of Person Days** **(ii)**  | **Person-Day Rate** **(US$) exclusive of VAT (iii)**  |  **Total Cost excluding** **VAT (US$)** **(i x ii x iii)**  |
| 1  |   |   |   |   |   |
| 2  |   |   |   |   |   |
| 3  |   |   |   |   |   |
| **Total cost for Post Implementation Support exclusive of VAT (b)**  |  |  |

**System Augmentation (resource fee/ per day)**

|  |  |  |  |
| --- | --- | --- | --- |
| **S. No.**  | **Resource Profile**  | **No. of Resources (a)**  | **Person-Day Rate (US$) exclusive of VAT**  |
| 1  |   |   |   |
| 2  |   |   |   |
| 3  |   |   |   |

Authorised Signatory of Bidder \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Place: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Key considerations on the financial format above

* Only those Bidders who qualify for the technical evaluation shall be shortlisted for financial evaluation.
* Providing a Price bid other than this format may lead to the rejection of the bid.
* Final financial quote needs to be in US$.
* The above bid is only for the consultant’s cost. IPPF will procure any necessary software licenses for the platform, which will be presented separately. As part of the proof of concept, IPPF would expect the consultant to share indicative costs for the proposed solution. This shall not be counted towards the financial evaluation of the proposal.

IPPF will not make any additional payments apart from the amounts quoted in the format provided above.

* The above rates shall be fixed and remain valid for the entire contract duration.
* Payments will be made as per the payment terms mentioned in this document.
* The payment for tasks/ activities related to ‘Augmentation Support’ shall be mutually deliberated and agreed upon as part of the change request procedure. However, the pro-rata rates, wherever they exist in the above financial quotes, shall be used to derive the cost.

**Disqualification**

The proposal/ bid is liable to be disqualified in the following cases:

* The proposal was not submitted in the formats prescribed in this document.
* Revision of quotes during the validity of the proposal or its extended period, if any.
* Proposal is conditional to the terms and conditions (not part of this Terms of Reference) and/or deviates from the terms and conditions of TOR.
* Proposal is received after the due date and time unless a specific waiver is sought from and granted by IPPF.
* Information submitted in bid is found to be misrepresented, incorrect or false at any time during the processing of the proposal/ contract (no matter at what stage) or during the tenure of the contract, including the extension period, if any.
* Bidder tries to influence the proposal evaluation process by unlawful/corrupt/fraudulent means at any point in time during the bid process.
* If any bidder submits multiple proposals or if common interests are found in two or more bids/bidders, the bidders are likely to be disqualified unless additional bids are withdrawn upon notice immediately.

**Clarification of Request for Proposal**

A prospective bidder requiring any clarification on the RFP may notify IPPF by e-mail. They shall submit any queries related to the RFP document in the following format in Excel or Word format only to dmasara@ippf.org (cc: rsingh@ippf.org) by 24th Oct 2025.

|  |  |  |  |
| --- | --- | --- | --- |
| S. No  | Page No from RFP | Section Reference from RfP  | Queries  |
|   |   |   |   |

The responses (explanation of the query but without identifying the source of the inquiry) to these queries shall be uploaded to the IPPF website (www.ippf.org) for ready reference by all prospective bidders.