TERMS OF REFERENCE

CONSULTANCY SERVICES FOR THE DESIGN AND DEVELOPMENT OF A MODERN INTRANET PORTAL ON MICROSOFT SHAREPOINT

MAY 2025

About FSDT

The Financial Sector Deepening Tanzania (FSDT) is a donor-funded financial sector market facilitator that aims to achieve poverty reduction through a transformative financial sector that offers inclusive and sustainable financial solutions to improve the livelihood, well-being, and empowerment of underserved Tanzanians. FSDT's work is guided by the Market Systems Development (MSD) approach, which aims to develop market systems that benefit the poor, offering them capacities and opportunities to improve their lives.

Currently, FSDT's main target markets are women and youth; to achieve a wider impact, our goal is to deliver quality financial solutions that support the economic development and growth of MSMES and farmers who are small-scale producers and who have been identified as the most financially excluded market segments in the country.

Through its catalytic function, FSDT hopes to achieve the following changes in the market:

- Improved policies, and legal and regulatory frameworks that promote gender equality, as well as economic and financial opportunities for women and youth.
- Improved availability of relevant financial sector infrastructures that will equip the financial sector players and other stakeholders with the ability to meet the needs and aspirations of women and youth.
- Financial service providers developing and scaling innovative and responsive financial solutions/tools for women and youth to promote equality, empowerment, and wellbeing.
- Improved confidence and capability of women and youth to demand and use financial solutions.

Background

The Financial Sector Deepening Trust (FSDT) has identified enhancing organizational learning through improved knowledge management systems as a key objective in its 2022-2026 Strategy. The Trust has invested in the Microsoft 365 ecosystem (SharePoint, Teams, OneDrive, and Power Platform) and other systems and tools to manage project documentation processes, team collaboration, and various administrative and operational activities.

While these investments have served basic document sharing and collaboration needs, we recognize significant opportunities to elevate the platforms' capabilities to better support our strategic objectives. As a knowledge-intensive organization, we understand that our competitive advantage relies on our ability to capture, organize, and effectively leverage our collective expertise. Thus, we are determined to build on the organization's existing technology investments to create an intuitive navigation and efficient information retrieval system, to foster a more connected, productive, and knowledge-rich environment that supports FSDT's mission-critical work.

Purpose and objectives of the assignment

FSDT is seeking proposals from qualified consultants to design, develop, and implement a modern intranet portal on SharePoint Online. This intranet portal will leverage on our existing Microsoft 365 ecosystem (SharePoint, Teams, OneDrive, and Power Platform) and other available technologies to create a more cohesive and effective digital workplace experience for

FSDT staff. We want to ensure that information is intuitively organized, easily discoverable, and automatically preserved as part of natural work processes.

Scope of Work

FSDT's Knowledge Management team has laid the groundwork for improving content governance and organizational learning processes and requires the successful consultant to have the technical expertise to translate these frameworks into an optimized SharePoint implementation that align with industry best practices. As such the consultant will be responsible for performing the following tasks:

1. **Implement a knowledge-centric SharePoint intranet** that aligns with FSDT's 2024/25 Business Plan objectives for strengthening organizational learning, creating an intuitive digital environment where institutional knowledge is systematically captured and made accessible.
2. **Enhance information architecture** through comprehensive tagging, classification, and metadata systems that improve discoverability, turning SharePoint's native search capabilities into a powerful knowledge retrieval tool that delivers relevant results.
3. **Establish document lifecycle management processes** that facilitate knowledge capture at key project milestones, ensuring valuable insights are preserved with appropriate expert validation and contextual classification.
4. **Create seamless integration** across the Microsoft ecosystem (SharePoint, Teams, OneDrive, and Power Platform) to establish natural workflows that incorporate knowledge sharing and retrieval into standard work processes.
5. **Implement strategic automations** using Power Platform tools that simplify information management and drive consistent practices across all departments and projects.
6. **Migrate relevant content** from the existing SharePoint environment while enhancing metadata and classification to demonstrate immediate value and ensure business continuity.
7. **Develop sustainable governance frameworks** and provide knowledge transfer to FSDT staff, ensuring we can independently maintain and evolve the system after initial implementation.
8. **Demonstrate measurable improvement** in knowledge accessibility, employee productivity, and organizational learning capability through defined metrics that align with FSDT's business objectives.

Deliverables

(i) An Inception Report – detailing the approach, workplan and technology requirements based on the comprehensive assessment of current state and user needs.
(ii) A functional and fully deployed SharePoint Online intranet portal with knowledge management capabilities, optimized information architecture, and enhanced search functionality.
(iii) Comprehensive user training materials and documentation for administrators, content managers, and end-users.
(iv) Complete integration setup with Office 365 applications (Teams, OneDrive, Power Platform) and other relevant external tools where necessary.

(v) Administrative and user access configuration including permission structures, security groups, and governance controls.

(vi) Planned and executed migration of files from the current intranet site with appropriate metadata application.

(vii) Detailed post-implementation support plan including knowledge transfer sessions and four weeks of dedicated support.

Timeline

The consultancy will be carried out between June 2025 and September 2025. Overall, the level of effort should be at most 60 days spread across the entire period.

Evaluation and Selection

Any individual or firm interested in participating in this bid should submit a separate technical and financial proposal to FSDT. The following format should be observed:

- Maximum 5-page technical proposal, including the following:
    - (i) Comments on the TORs
    - (ii) Proposed implementation approach
    - (iii) Team/Consultant Profile
    - (iv) Relevant previous work (include three references with email and phone number)
    - (v) Annex with CV of key personnel (excluded from the 5-page count)

- Overall, the preferred bidder will be selected based on presenting the most economically advantageous tender. This means that bidders will be evaluated on technical and financial criteria. In this case, the ratio between technical and financial scores will be 80/20.

- All proposals will be assessed against the mandatory criteria outlined below. Only those that meet these requirements will be considered for technical evaluation.

S/N	Criterion	Type	Pass/Fail Basis
1	Certified Microsoft Solutions Partner	Mandatory	Certificate or official status
2	Minimum 3 relevant assignments (firm)	Mandatory	Submission of 3 verifiable samples
3	Academic qualifications (Team & Experts)	Mandatory	Degree certificates

- The technical component of each proposal will be scored first using a grid that assesses several key attributes. This is set out below.

Technical Proposal Scoring Grid

The table below describes the criteria and weights to score, assess, and select the best candidate to undertake this assignment. The evaluation committee will review all the submitted proposals and score them based on the criteria below:

Evaluation Criteria	Marks
Required experience (Individual/Consulting firm)	
The individual/consulting firm must demonstrate experience in designing and implementing SharePoint-based Intranet Hubs - Provide at least 3 samples of previous assignments in the last 3-5 years.	*20*
The individual/consulting firm must be a certified Microsoft Solutions Partner for Modern Work.	*5*

Experience in similar assignment with Non-profit, education or research organization operating in Tanzania, East Africa, or similar markets - is an advantage.	5
Sub Total – Experience	30
Team Composition	
Team Leader or Lead consultant	
The Team Leader must meet the following qualifications to be considered eligible to undertake the tasks laid out under the scope of services.	
A Bachelor or Master's Degree in Computer Science, Computer Engineering, Information Technology, or related field.	5
A minimum of 10 years of experience in information technology architecture, with at least 5 years' experience facilitating intranet design and implementation, SharePoint-based document management solutions, and knowledge management hubs design.	15
Demonstrated experience working with Non-profit, education or research organization.	10
Demonstrated analytical, reporting and communication skills.	2.5
Must be fluent in English both verbal and written. Ability to understand and or speak Kiswahili or experience delivering multilingual systems is an advantage.	2.5
Other Key Experts consultant(s)	
Key experts must meet the following qualifications to be considered eligible to undertake the tasks laid out under the scope of Services.	
A bachelor's degree in Computer Science, Computer Engineering, Information Technology, or related field.	5
A minimum of 5 years of experience in information technology architecture, with at least 2 years' experience facilitating intranet design and implementation, SharePoint-based document management solutions, and knowledge management hubs design.	5
Demonstrated analytical, strong coordination, and communication skills.	2.5
Must be fluent in English both verbal and written. Ability to understand and or speak Kiswahili or experience delivering multilingual systems is an advantage.	2.5
Subtotal - Team Composition	50
Adequacy of Methodology and Comments	
Technical approach and methodology (demonstration of clear understanding of TORs, detailed methodology)	15
Adequacy of the comments on the TOR	5
Sub-Total – Methodology	20
Total	**100**

Overall, the preferred bidder technically, will be finally selected based on the most economically advantageous tender. The ratio between technical and financial scores that bidders will be evaluated on will be 80/20 as itemized below:

- For the technical proposal to be considered, a minimum total technical score of 70 out of 100 is required. Only financial proposals from bidders scoring at least that level will then be evaluated.
- The total financial cost in US$ will be weighted according to the formula:
  - (Lowest total financial cost/ Bidder's total financial cost) x 0.2
  - Total technical marks are weighted by a factor of 0.8.

- The weighted technical and financial scores for each proposal that passes the minimum technical threshold will then be added to produce a total score. The preferred bidder will be the one producing the highest total combined score.
- The winning bidder will be notified of their selection, and other bidders will be informed of the outcome.

Financial Proposal

- This will be a reimbursable fee contract up to a maximum financial limit. Financial proposals should be quoted in US dollars. FSDT requires a detailed and transparent budget breakdown in which all line items are specified.
- Financial proposals should be submitted electronically, **separate** from the technical proposal.
- Provide a daily rate for work within Dar es Salaam for the main consultant and all potential co-facilitators.
- It is assumed that in case of any transport expenses or remote facilitation FSDT will directly facilitate the same. If the consultant is based outside Tanzania, FSDT will not cover travel costs in and out of Tanzania.

Financial proposals should be in this format:

Detail/Item	Rate (US$)	Total (US$)

This consultancy will be subject to local taxes. It is the sole responsibility of the Consultant to meet all the tax liabilities arising out of this assignment; therefore, the quoted price should include all applicable local taxes.

Kindly note that the budget for this assignment (including any taxation) is capped at 35,000 USD.

Submission of Bids and Enquiries

The deadline for submission of the proposals is 5:00 pm (EAT, GMT +3) on Monday the 16th of June 2025.

All Submissions must be made electronically to: procurement@fsdt.or.tz.

Any queries relating to these ToRs should be submitted in writing to FSDT under the following address: all questions and the answers will be shared with all short-listed bidders. The deadline for any queries is 2 days before the tender submission deadline.

Procurement Manager,
The Financial Sector Deepening Trust,
2nd Floor De Ocean Plaza,
Plot 400 Toure Drive,
P.O. Box 4653, Oyster Bay, Dar es Salaam, Tanzania
+255 222 602 873/5/6
procurement@fsdt.or.tz

Other Matters

Confidentiality

All information contained in the Terms of Reference and attachments are provided on a strictly confidential basis solely for the use of tenders in connection with the competition for the supply of services. It is a condition of this competition that tenderers (and any sub-contractors) shall:

- Take all reasonable measures to protect this confidentiality and avoid the unauthorized use, disclosure, publication, or dissemination of confidential information.
- Not use this information other than for the purposes of preparation of a tender, and shall disclose it only to officers, directors, or employees on a specific need to know basis; and
- Not disclose, publish, or otherwise reveal any of the information contained herein except with the specific prior written authorization of FSDT.

Conflict of Interest

Tenderers (and any sub-contractors) must disclose in their tender details of any circumstances, including personal, financial, and business activities that will, or might, give rise to a conflict of interest if they were awarded this contract. Where Tenderers identify any potential conflicts, they should state how they intend to avoid such conflicts. FSDT reserves the right to reject any tender which, in its opinion, gives rise to, or could potentially give rise to, a conflict of interest.

Taxation

The winning bidder will be responsible for paying withholding tax and all other tax liabilities as per Tanzanian Tax laws. Any such tax amounts shall be the responsibility of the consultant.