



# FSM PETROLEUM CORPORATION

## REQUEST FOR PROPOSAL RFP # 2024-04

Date: January 24, 2024

### SHORT TERM CONSULTANCY: MICROSOFT SHAREPOINT CONSULTANT

Vital FSMPC seeks the services of a qualified SharePoint Consultant to assess the organization's current SharePoint environment, document storage and management practices, data structures, including their existing deficiencies, usability, and areas of concern, and to propose, design, and implement a new solution using Microsoft SharePoint Online. See details in the Terms of Reference.

1. All interested individuals are to submit their proposals including all annexes by email to [rfp@fsmnpc.com](mailto:rfp@fsmnpc.com) before 5:00 PM (GMT+11), on February 14, 2024.
2. Vital FSMPC reserves the right to accept or reject any proposals without thereby incurring any liability to the individual or vendor submitting the proposal.
3. All prices shall include a daily rate for consultancy services and be inclusive of all costs related to the delivery of the consultancy services to Vital FSMPC.
4. Any requests for clarification or additional information shall be directed to [rfp@fsmnpc.com](mailto:rfp@fsmnpc.com).

This letter shall not be construed in any way as an offer to contract or obligation for Vital FSMPC to procure from you or your organization.



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## ANNEX I TERMS OF REFERENCE RFP # 2024-04

### SHORT TERM CONSULTANCY – MICROSOFT SHAREPOINT CONSULTANT

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#### 1. BACKGROUND

Vital FSMPC's ability to respond to emerging opportunities and threats depends on how well it can create, capture, use, and preserve knowledge and information to make decisions and take action to achieve its operational and strategic goals. Along with people and finances, information is a key business resource for the organization, and as such, the management of that information is critical to achieving business priorities.

Over the past twelve (12) years, the organization has accumulated large amounts of documents in both electronic and paper form. These electronic documents are mainly created in Microsoft Office applications, but digital images, videos, PDF, and AutoCAD drawings are also generated.

Currently, Vital FSMPC does not have in place a well-functioning Document Management System. In its current state, the organization is hampered by the use of multiple document storage locations (including SharePoint 2010; shared network drives and ad hoc historical folder structures; email folders, filing cabinets, and line of business applications such as Sage, PetroX); inability to search for information in an efficient way; and inconsistent naming conventions. As a result, the system is highly duplicated, and information is often inaccessible. These issues impact Vital FSMPC's ability to effectively collaborate, manage programs and projects, and utilize the information, tools, and resources within the organization.

Vital FSMPC seeks to improve its Document Management System, structure, and practices so that staff are better able to collaborate, communicate, and share information across multiple business locations, business functions, and organizational levels through a system that provides accurate, accessible, secure, organized, and quality information.

Vital FSMPC's recent move to Microsoft's cloud-based sharing platform (Microsoft 365 E3) provides a great opportunity for the organization to significantly improve its document management system, practices and processes using SharePoint Online.



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## 2. PURPOSE

This Terms of Reference sets out the requirements for a short-term consultancy for a qualified SharePoint Consultant to assess the organization's current SharePoint environment, document storage, management practices, data structures, including their current deficiencies, usability, and areas of concern, and to propose, design, and implement a new solution using Microsoft SharePoint Online.

## 3. OBJECTIVES

The key objectives for engaging in this consultancy work include:

1. Compliance of record keeping and accessibility with industry standards.
2. Structured, organized, secure, accurate, and highly available corporate information.
3. Fulfilment of information requests is performed easily.
4. One single source of truth for business records and documents.
5. Version controlling of document repositories to provide up to date versions and history of stored documents.
6. Establishment of new procedures and governance for the storage of master and controlled copies of documents.
7. Improvement in the quality control of document management through governance and staff education.
8. Reduction in the risk of non-compliance for governance, practices, and security that need to comply with legislation within the jurisdictions the corporation operates.
9. Improvement in document management and storage.
10. Increase access security through improved and agreed security permissions.
11. Implementation of secure internal and external document sharing for document collaboration.
12. Ability to capture and disseminate corporate knowledge through improving efficiencies, reducing costs, and driving customer service.
13. Transition of business culture from information-centered to knowledge-centered.

## 4. SCOPE OF WORK

Vital FSMPC seeks a strong self-motivated consultant who can work remotely with and across diverse teams to help design and build a quality solution using SharePoint Online for enhanced document storage and management, collaboration, coordination, and communication. This section defines the work activities to be provided by the consultant as part of this engagement:

### A. Baseline Assessment

The consultant will engage with Vital FSMPC stakeholders to:

- Perform a baseline assessment of the organization's current SharePoint environment, document storage, management practices, data structure(s), including their existing deficiencies, usability, and areas of concern.

### B. Solution Design and Build of New Solution

- Leveraging existing discovery work, document requirements on what Vital FSMPC needs for the future solution in regards to record/document storage and management purposes and for sharing of information with other teams across the organization.
- The consultant will produce a design of the new SharePoint Solution including the architecture, functionality, as well as wireframe examples.
- Draft a scope of work to meet the goals, requirements, and specification for the new solution to be approved by Vital FSMPC.
- Develop and implement a migration strategy and plan to be used for migration of identified documents from selected repositories to the new solution in a pragmatic way.

### **C. Implementation of New Solution**

The consultant will configure and deploy the new solution ensuring that:

- The new solution, including SharePoint elements, such as sites and document libraries, are effectively structured and configured.
- Pages and other links are set up as needed for ease of access and use.
- Appropriate security and permissions are established and set up correctly.

### **D. Migration of Documents to the New Solution**

Once the core elements of the new solution have been configured, the consultant will guide and assist with the migration of identified documents from existing repositories to the new solution.

### **E. Solution and End User Documentation and Training**

The consultant will provide systems (role-based) end-user documentation (manuals, user guides in digital format) and training to ensure the effective and successful use of the solution.

- Train key users or site owners so that they are able to continue evolving the solution as needs arise. On specific tasks such as but not limited to:
  - i. Creating pages, quick links, views, and other features.
  - ii. Uploading documents, naming, and tagging them appropriately.
  - iii. Document Management
- Train site owners in site management to be able to maintain access, noting that different publishers may be responsible for different areas of the site.
- Develop and provide user guides for Vital FSMPC to be able to continue with ongoing management and evolution of the new solution.

### **F. Solution Delivery, User Acceptance Testing and Go-Live**

The consultant will work with Vital FSMPC to provide the necessary technical staff to carry out the acceptance testing of the new solution prior to going live.

## **5. DELIVERABLES**

The consultant should prepare a detailed three-month rolling action plan to ensure that different elements of the new solution are moving forward consistently. Some work may need iteration as

feedback is gathered following implementation. Below are the key deliverables for this engagement.

Tasks	Product / Deliverables	Estimated Timeframe (TBC by the Consultant)
1. Consultation	<ul style="list-style-type: none"> <li>• Scope of work with clear understanding of Vital FSMPC needs and requirements, schedule of activities and milestones, list of expectations and timelines.</li> <li>• Initial conceptual design of new SharePoint Online solution to address needs and requirements.</li> <li>• Migration plan of identified documents from current repositories to the new solution.</li> </ul>	2 months
2. Solution Design	<p>Graphic design and build of the new solution are completed, including but not limited to:</p> <ul style="list-style-type: none"> <li>• Architecture</li> <li>• Functionality</li> <li>• Wireframes</li> <li>• Workflows, access, and support</li> <li>• Other works as appropriate</li> </ul>	3 months
3. Implementation	<ul style="list-style-type: none"> <li>• The new solution is configured and set up with all agreed key features and requirements.</li> <li>• All iterations are completed based on client and user feedback.</li> <li>• Security is configured.</li> <li>• All identified documents are migrated to new solution.</li> </ul>	4-5 months
4. Training	<ul style="list-style-type: none"> <li>• Key solution focal points are trained to use and maintain the system.</li> <li>• Staff are trained and able to use the solutions effectively</li> </ul>	3 months
5. Document and Report	<ul style="list-style-type: none"> <li>• All documentation and training material completed.</li> <li>• Final report of work done and recommendations.</li> </ul>	1 month

## 6. ORGANIZATIONAL ARRANGEMENTS

The consultant will report directly to the organization's ICT Manager. The consultant's work plan will be reviewed periodically, and any adjustments made will be based on needs and emerging priorities.

## 7. PLACE OF ASSIGNMENT

Majority of the work will be remote based, however travel to the FSM will be required quarterly to develop scope of work for each quarters work.

## 8. DURATION OF ASSIGNMENT

This is a short-term consultancy. Exact timings for the consultancy period will be confirmed based on availability.

## 9. QUALIFICATIONS, SKILLS, AND EXPERIENCE

The successful consultant is expected to have:

1. Education:
  - A bachelor's degree or equivalent in a related field, such as computer science, information technology, or web design, can be beneficial.
2. Technical Skills:
  - Proficiency in SharePoint Online: An in-depth understanding of SharePoint Online's features, architecture, and capabilities is crucial.
  - Web Development: Knowledge of web technologies (HTML, CSS, JavaScript) for customizing and branding of SharePoint.
  - SharePoint Designer: Proficiency in using the SharePoint Designer app to create and customize sites, workflows, and web parts.
  - SharePoint Framework (SPFx): Familiarity with SharePoint Framework for developing custom web parts and extensions.
  - PowerShell: Skill in scripting with PowerShell for automation and administration of SharePoint.
  - SQL: Basic knowledge of SQL for data integration and customization.
3. Design and User Experience:
  - User Interface (UI) and User Experience (UX) design skills to create visually appealing and user-friendly SharePoint site.
  - Information architecture and navigation design for efficient content organization.
4. Certifications:
  - Relevant certifications, such as Microsoft Certified: SharePoint Developer, to validate SharePoint and other related skills.
5. Problem-Solving and Troubleshooting:
  - Strong analytical and problem-solving skills to address issues, customize solutions, and optimize SharePoint site.
6. Communication Skills:



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- Effective communication is essential for collaborating with stakeholders and understanding their requirements.
- 7. Project Management:
  - Familiarity with project management concepts is valuable.
- 8. Business Acumen:
  - Ability to understand and consider business needs, objectives, and goals.
- 9. Remote Work:
  - Experience working remotely and with international organizations.
- 10. Teamwork and Collaboration:
  - Ability to work and collaborate effectively with team and business users.

### 10. PAYMENT DETAILS AND FURTHER CONSIDERATIONS

- Monthly payment, based on completed tasks and progress reports, approved upon monthly review with Vital FSMPC.
- The Consultant is responsible for arranging his/her own travel and accommodation. Vital FSMPC will reimburse the consultant as per agreed terms.
- The consultant is responsible for his/her own health and travel insurance.

### 11. EVALUATION CRITERIA

Vital FSMPC intends to enter into an agreement with the Consultant who provides a proposal that best meets the criteria listed below. The intent of this process is to select the consultant deemed most capable, and the approach deemed most successful in designing, developing, and implementing a SharePoint document management solution meeting Vital FSMPC’s functional requirements.

Criteria	Description	Rating scale to be used
Experience, Expertise, and References	<ul style="list-style-type: none"> <li>● Consultant's experience and expertise with SharePoint Document Management projects.</li> <li>● Three (3) references including samples of the work or projects of similar scope and complexity. The reference contact information shall include the customer’s name, start/end dates of the engagement, customer e-mail address, street</li> </ul>	<ul style="list-style-type: none"> <li>● 1-3: Limited experience, expertise, and positive references.</li> <li>● 4-7: Adequate experience, expertise, and positive references.</li> <li>● 8-10: Extensive experience and expertise with a proven track record, and strong positive references.</li> </ul>

	address, telephone number, a description of the services provided and timeframe.	
Technical Proficiency	<ul style="list-style-type: none"> <li>• Consultant’s technical skills in SharePoint and related technologies</li> <li>• Consultant’s understanding of SharePoint features and functionalities relevant to document management.</li> </ul>	<ul style="list-style-type: none"> <li>• 1-3: Limited technical skills.</li> <li>• 4-7: Adequate technical skills.</li> <li>• 8-10: High level of technical proficiency with in-depth knowledge of SharePoint features and functionalities.</li> </ul>
Customization and Integration Capability	<ul style="list-style-type: none"> <li>• Consultant's ability to customize SharePoint to meet organization's requirements.</li> <li>• Consultant’s experience in integrating SharePoint with other systems.</li> </ul>	<ul style="list-style-type: none"> <li>• 1-3: Limited customization and integration capabilities.</li> <li>• 4-7: Adequate customization and integration capabilities.</li> <li>• 8-10: Advanced customization and seamless integration capabilities.</li> </ul>
Change Management and User Training	<ul style="list-style-type: none"> <li>• Consultant’s approach to change management and training for users to effectively utilize the document management system.</li> </ul>	<ul style="list-style-type: none"> <li>• 1-3: Weak change management and training plans.</li> <li>• 4-7: Adequate change management and training plans.</li> <li>• 8-10: Comprehensive change management and effective training programs.</li> </ul>
Project Management Methodology and Approach	<ul style="list-style-type: none"> <li>• The process and methodology to be used by the consultant during the implementation of the solution. The consultant’s proposal should demonstrate his/her understanding of Vital FSMPC’s needs and requirements and offers an organized and</li> </ul>	<ul style="list-style-type: none"> <li>• 1-3: Poor project management methodology.</li> <li>• 4-7: Adequate project management methodology.</li> <li>• 8-10: Well-structured and effective project management methodology.</li> </ul>



	systematic approach to the design of the new solution and completion of work.	
Cost and Value for Money	<ul style="list-style-type: none"> <li>Proposed cost of the consultancy services in relation to the value they are expected to deliver.</li> <li>Detailed breakdown of costs and ensure there are no hidden fees.</li> </ul>	<ul style="list-style-type: none"> <li>1-3: Poor value for money.</li> <li>4-7: Fair value for money.</li> <li>8-10: Excellent value for money with clear cost justification.</li> </ul>

**12. APPLICATION PROCESS**

Interested candidates should submit their proposals, CVs, references, indicative costs and/or hourly rates accompanied by a cover letter by February 14, 2024, to [rfp@fsmpec.com](mailto:rfp@fsmpec.com) (Ref: SharePoint Consultant).



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## DUE DILIGENCE QUESTIONNAIRE

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Please complete the following questionnaire and provide supporting documents where applicable.

1. Please provide any two of the following documents to verify identity and proof of address:
  - a. Passport
  - b. Driver's license
  - c. Voter ID card or other government-issued identity card

2. Have you ever been convicted of any criminal offences? Yes No

If you answered 'yes', please provide further details.

3. Have you ever been the subject of any investigation, indictment, conviction, or civil enforcement action? Yes No

If you answered 'yes', please provide further details.

Name: .....

Signature: .....

Date: .....



# FSM PETROLEUM CORPORATION

## SHORT TERM AGREEMENT / INDEPENDENT SERVICES

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**SHORT-TERM AGREEMENT** (hereinafter the “**Agreement**”) made between **Vital FSMPC** (hereinafter the “**Corporation**”)

AND \_\_\_\_\_ (hereinafter the “**Consultant**”).

**WHEREAS** Vital FSMPC is desirous in engaging the services of the Consultant on the terms and conditions hereinafter set out; **AND WHEREAS** the Consultant is prepared to accept this engagement from the Corporation on the said terms and conditions; **NOW THEREFORE** the parties hereto respectively agree as follows:

1. **DEFINITIONS** – The term “Corporation” in this Agreement means Vital FSMPC, its successors or assigns and includes the Chief Executive Officer for the time being and the Chief Executive Officer’s duly authorized agent as the case may be. The term ‘Consultant’ in this Agreement includes the consultant allocated to work on this project. The Consultant is:  
\_\_\_\_\_.
2. **NATURE OF SERVICES** – The Consultant shall perform the requisite services as set out in Annex 1 to this Agreement, which is attached hereto and forms part of this Agreement. The Consultant certifies that he/she is competent to perform the requisite services as herein detailed.
3. **TENURE** – This Agreement shall come into effect on \_\_\_\_\_ and shall expire on the satisfactory completion of the requisite services described in **Annex 1 (Terms of Reference)** but in any event not later than \_\_\_\_\_ unless sooner terminated or an extension of time has been granted by the Corporation in accordance with paragraph 15.2 below.
4. **REMUNERATION** – The Consultant shall be remunerated for satisfactory completion of the requisite services under this Agreement within the specified tenure.
  - (a) Based on the provision of Invoice and Progress Reporting on services rendered, payment shall be made by either On-Line Transaction or Direct Deposit into the Consultant’s specified Bank Account.
  - (b) Billing invoices shall be submitted on the 1<sup>st</sup> week of each month and shall be paid within thirty (30) days.



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5. **COMPLIANCE WITH LAW** – In connection with this Agreement, the Consultant shall comply with all laws, rules, and regulations, as applicable to the Federated States of Micronesia or any of its States, Municipalities or Subdivisions.
6. **RIGHT TO WITHHOLD** – The Corporation reserves the right to withhold remuneration as provided for under paragraph 4 of this Agreement, if in the sole opinion of the Corporation, the services performed under the Agreement including the final report of the Consultant are unsatisfactory, incompetent, or otherwise incomplete and have not been rectified to the reasonable satisfaction of the Corporation.
7. **TRAVEL** – As required for the performance of this Agreement, travel and reimbursable expenses will be paid in accordance with the Corporation’s travel policies and standard rates, on submission of claims and receipts. Alternatively, the Corporation may assist in arranging travel requirements for the Consultant if needed.
8. **STATUS OF CONSULTANT** – The Consultant shall be considered as having legal status of an independent consultant and neither the Consultant, the Consultant’s agents nor the Consultant’s employees shall be considered in any respect as being officials or employees of the Corporation.
9. **RIGHTS AND OBLIGATIONS** – The rights and obligations of the Consultant are as strictly limited by this Agreement. The Consultant shall not be entitled to any benefit, payment, subsidy, compensation, or entitlement, except as expressly provided for in this Agreement. The Consultant shall not seek nor accept instructions from any person in connection with the services to be performed under this Agreement except in writing from the Chief Executive Officer’s duly authorized agent. The Consultant shall refrain from any action which may adversely affect the Corporation and shall fulfill all obligations under this Agreement with full regard to the Corporation’s interests. The Consultant shall not use the name, official seal, or emblem of the Corporation nor purport in any way to represent the Corporation, its Chief Executive Officer, or its staff.
10. **INTELLECTUAL PROPERTY RIGHTS** – The Corporation exclusively owns the Intellectual Property Rights including title rights, copyrights, and all other rights whatsoever in any material produced under the provisions of this Agreement.

### 11. UNPUBLISHED INFORMATION AND CONFIDENTIALITY

- (a) The Consultant shall keep secret and confidential and shall not communicate to any person or to any other body corporate or incorporate any unpublished information made known to the Consultant by the Corporation or by any Stakeholder in connection



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- with the execution of this Agreement except with express authorization in writing from the Corporation.
- (b) The Consultant shall keep confidential the substance of the recommendations made and advice given in connection with this Agreement.
  - (c) The obligation of confidentiality shall survive the expiration of this Agreement.
12. **GENDER POLICY** – The Corporation has a gender policy and a gender-inclusive language guide, which will be provided to the Consultant upon request. The Consultant shall ensure that all presentations made, and written documents produced under this Agreement use gender-inclusive language and that wherever possible, all research and reporting consider and reflects the situations and experiences of both men and women. Whenever data on people is collected, it shall be disaggregated by sex.
13. **INDEMNITY** – The Consultant shall indemnify and keep indemnified the Corporation from and against all actions, suits, claims, demands or costs whatsoever arising out of or in connection with the performance of the services set out in this Agreement.
14. **PRIVILEGES & IMMUNITIES** – Nothing in or relating to this Agreement whether explicit or implicit shall be deemed to be a waiver of any of the privileges and immunities of the Corporation.
15. **DELAY AND EXTENSION**
- (a) The Consultant shall be liable for delays exceeding ten (10) working days after the due date for the performance of services under this Agreement unless otherwise agreed upon in writing. A penalty of 1% of the fee listed in paragraph 4 above per day of delay shall be imposed and deducted from the fee. The total penalty shall, however, not exceed 25% of the fee listed in paragraph 4 above.
  - (b) In the case of delay occasioned by circumstances beyond the Consultant’s control, the Corporation may grant extensions of time without penalty. In such cases, the Consultant shall, within five (5) working days after the facts giving rise to the delay have come to the Consultant’s notice, provide the Corporation with an estimate in writing of the effect of such delay on the time for completion of services under this Agreement. The Corporation shall give due consideration to the circumstances and shall advise the Consultant of any revision to deadlines for the performance of services and/or the completion date of the Agreement as the Corporation sees fit.
16. **TERMINATION** – Either party may terminate this Agreement at any time by giving thirty (30) days’ notice in writing of its intention to do so. If the Agreement is terminated by the Consultant, no remuneration for actual work done to that date shall be paid to the Consultant, and any remuneration already paid must be returned to the Corporation, unless otherwise



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agreed by the Corporation in due consideration of the circumstances. If the Agreement is terminated by the Corporation, the Consultant shall be compensated for actual work performed to the Corporation's satisfaction to that date on a pro rata basis.

**17. CONTINUING LIABILITY** – The termination or expiration of this Agreement shall not release the Consultant from liability in respect of any breach, non-performance or non-observance of any provision, stipulation, or obligation to be observed or performed by the Consultant pursuant to this Agreement.

**18. APPLICABLE LAW** – This Agreement is subject to and shall be construed in accordance with the laws in force from time to time in the Federated States of Micronesia.

**IN WITNESS WHEREOF** the parties hereto have executed this Agreement.

SIGNED for and on behalf of the CORPORATION BY:	SIGNED by the CONSULTANT:
..... Signature	..... Signature
..... Name	..... Name
..... Title	..... Title
..... Date	..... Date
In the presence of:	In the presence of:
..... Signature	..... Signature
..... Name	..... Name
..... Title	..... Title
..... Date	..... Date



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