

Terms of Reference

SharePoint Online as a knowledge management and learning system in a consortium

Organisation: CARE Germany

Project: Community-based adaptation: Scaling-up action for livelihoods and ecosystems in Southern Africa and beyond (CBA SCALE Southern Africa+)

Title: SharePoint Online as a knowledge management and learning system in a consortium

Activity No.: WP3 A III.1

CARE Germany is an international non-governmental organisation (NGO). The organisation stands for a long tradition of aid and partnership that began with the CARE package after the 2nd World War ended. We are part of the CARE International network and work with partners around the world to alleviate poverty, create opportunities for development and uphold the dignity of people of all genders and social groups. We are particularly committed to the empowerment of women and girls. CARE is non-partisan, non-denominational and committed to the humanitarian mandate.

1. Background to the project and assignment

Heatwaves, recurring droughts and extreme rainfall are the harsh reality of climate change for communities in Southern Africa. Ecosystems and infrastructure suffer, while people struggle to meet their basic needs. To support those groups most impacted by climate change, community-based adaptation is a proven model of success. It aims to create livelihood opportunities for communities suffering from climatic shocks. CARE Germany is the consortium leader in a five-year project that will work in around 100 communities in Mozambique, Zambia and Zimbabwe. Project partners (FANRPAN, IISD, IUCN and local partner organisations) will introduce a variety of solutions to navigate the changing climate, ensuring that these are nature-based, gender-responsive and fair. The project aims to support around 500,000 people to manage climate risks. The adaptation actions will act as a stimulus for scaling up. The project will also work with national and international decision-makers to foster an enabling policy and financing environment for community-based adaptation. This will enable many more communities to benefit from the impact of the project.

A KMLS has many benefits for us as a consortium of development and environmental NGOs working in the field of community-based adaptation to climate change. Consortium members based in different regions of the world can use the KMLS to keep abreast of the latest developments and initiatives, reducing the risk of duplication and improving collaboration.

The KMLS also serves as a platform for sharing experiences, best practice and lessons learned between consortium members, fostering a culture of continuous reflection and learning. With the ability to effectively transfer knowledge and information between members, the KMLS helps to bridge the geographical and institutional gap between consortium members and supports effective decision-making in a complex, multi-disciplinary project such as CBA SCALE Southern Africa+.

The KMLS also helps us to reduce the risk of losing valuable knowledge, especially when key staff leave the consortium. By institutionalising knowledge, the KMLS ensures that the expertise and insights of departing staff are not lost and can be used in the future. In addition,

the system should also facilitate project management and include functions for planning, controlling and tracking tasks and to monitor project status and facilitate day-to-day collaboration.

In short, the KMLS helps us to foster collaboration, learning and knowledge transfer within the consortium, contributing to the overall success and impact of the CBA SCALE Southern Africa+ project.

2. Responsibilities and tasks

We are seeking a highly skilled and experienced individual consultant or a team of consultants to design and maintain a KMLS for a consortium of different organisations. The system should be based on Microsoft SharePoint Online, OneDrive for Business and Teams and should be implemented in English. In addition, it should, depending on its functionality, include a project management application such as Microsoft Project. CARE Germany will be responsible for this system as consortium leader. We already use all of the above applications.

The assignment can be carried out remotely.

Key responsibilities:

- Design a SharePoint Online-based KMLS, including a project management application, that meets the needs of the consortium.
- Ensure the system is easy to use, intuitive, and accessible to all consortium members.
- Provide training and support to consortium members to ensure the effective use of the system.
- Ensure the system is secure and complies with data privacy regulations (GDPR).
- Provide ongoing support and maintenance for the system to ensure its continued effectiveness.

Tasks:

- Participate in a preparatory meeting for conceptualisation, process planning and further coordination.
- Conduct an analysis of the consortium's aim and objectives for the KMLS and project management application. In preparation for this assignment, a knowledge management and learning strategy will be developed by the consortium. This strategy will provide the framework for the assignment. The consultant is expected to familiarise himself/herself with this strategy.
- Outline approaches to a new SharePoint Online-based KMLS that will most effectively and efficiently implement the consortium's strategy.
- Outline approaches to using a project management application such as Microsoft Project.
- Prepare an implementation plan for the SharePoint Online-based KMLS, the project management application and for the involvement of the consortium members.
- Support in setting up the SharePoint Online-based KMLS as well as the project management application. CARE Germany's IT department will do most of the work to set it up. The consultant is expected to provide support in areas where the expertise of CARE Germany's IT department is not sufficient (incl. design specifications and technical documentation).
- Support the development of application aids. The consortium will develop most of the application aids itself. During the development process, the consultant is expected to provide suggestions and examples of application aids, as well as feedback.

- Provide ongoing support and maintenance for the KMLS from 2025 to 2028. Up to 3 working days per year are planned for this.

3. Products / services

- Concept (methodological approach) for the implementation of the assignment (incl. revision after preparatory meeting).
- Presentation of the possible approaches for a SharePoint Online-based KMLS and project management application. This presentation should illustrate possible approaches in a concise manner, with reference to the analysis of the consortium's aim and objectives for the KMLS (presentation and brief summary).
- Implementation plan for the SharePoint Online-based KMLS, project management application and for the involvement of the consortium members.
- Support in setting up the SharePoint Online-based KMLS and project management application (incl. design specifications and technical documentation).
- Support the development of application aids.
- Support and maintenance for the KMLS from 2025 to 2028.

4. Qualification profile

The assignment is for an individual consultant or a team of consultants. The following key qualifications are expected in the team:

- Extensive expertise in designing and implementing SharePoint Online-based knowledge management and learning systems as well as project management applications.
- Up-to-date knowledge of Microsoft 365, SharePoint Online and other Microsoft features and functionality.
- Strong understanding of data security and privacy requirements (GDPR).
- Ability to understand, analyse and translate the requirements and needs of a consortium of different organisations into technical solutions.
- Ability to identify, evaluate and recommend alternative solutions.
- Excellent communication and interpersonal skills.
- Ability to clearly explain technical concepts in a way that is understandable to non-technical users.
- Excellent verbal and written English skills.

5. Preliminary timetable

- Briefing (preparatory meeting) by CARE Germany – beginning of April 2024
- Revision of the submitted methodological approach – a week after the briefing
- Presentation of the possible approaches for a SharePoint Online-based KMLS – beginning of May 2024
- Implementation plan – May 2024
- Support in setting up the SharePoint Online-based KMLS – May-June 2024
- Support the development of application aids – May-June 2024
- Support and maintenance for the KMLS – 2025 to 2028

6. Management of the assignment

The assignment will be coordinated by CARE Germany. The Consortium Manager will be the direct contact person.

7. Quantity scope of the assignment

Up to 15 working days can be claimed for the first part of the assignment.

Up to 12 working days (3 per year on average) can be claimed for the second part of the assignment (maintenance of the KMLS) from 2025 to 2028.

8. Evaluation criteria

Expressions of interest will be evaluated on the basis of the following criteria:

- Quality of the submitted expression of interest with regard to methodological approaches and experience – **Weighting 70%**
- Total price and transparency of costs – **Weighting 30%**

9. Invitation to express interest (Eoi)

If you have a passion for designing and maintaining knowledge management and learning systems as well as project management applications and meet the requirements outlined above, we encourage you to express your interest for this exciting opportunity. An interested individual consultant or a team of consultants can apply. In the case of a team of consultants, one member of the team must be appointed as the team leader. This person is responsible for the coordination of the entire team and the provision of all services to CARE Germany. He/she is also the main contact person for CARE Germany.

The expression of interest must contain the following documents in English:

- A **description of your skills and competences** of no more than two pages, addressing the qualification profile.
- **References** supporting the qualifications. More than one qualification may be supported by a single reference.
- A **description of your methodological approach** of no more than four pages that
 - sets out your understanding of the tasks,
 - provides an overview of your proposed methodology for carrying out the assignment,
 - and the role and contribution of each consultant.
- A **draft work plan with a budget** indicating the main costs of the assignment (including fees), the scope of the work to be carried out and the number of working days planned.
- A **CV** for each consultant.

Please send your expression of interest by email only to:

vergaben@care.de

Subject: GLO2575 KMLS

CARE Deutschland e. V.
Siemensstr. 17
53121 Bonn
Germany

<https://www.care.de>

Deadline: 22 March 2024, 23:59 CET

Any questions relating to the expression of interest may be submitted by 15 March 2024 exclusively by email to Mr Stefan Mielke, Consortium Manager (mielke@care.de). A summarised version of these questions and corresponding answers will be emailed to all expression of interest submitters by 19 March 2024.