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TERMS OF REFERENCE (TOR)
BID NCS/RFP/GIPF-01/2025
IMPLEMENTATION OF THE GIPF FILE PLAN

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1. EXECUTIVE SUMMARY

The Government Institutions Pension Fund (GIPF), in collaboration with the National Archives of Namibia, has approved a GIPF File Plan and seeks to implement it on Microsoft SharePoint. This Request for Proposal (RFP) invites experienced and accredited Microsoft SharePoint solution service providers to submit a proposal for the implementation of the File Plan, in line with the details and specifications outlined in this Terms of Reference (TOR). All interested parties are requested to submit detailed proposals including the following minimum requirements: an entity profile, certificates of good standing, a detailed proposed solution and architecture, a financial proposal, project management methodology, and references to previous similar File Plan Solution implementations.

2. BACKGROUND

GIPF has successfully implemented a Microsoft SharePoint solution to unlock several benefits for the Fund, including enhancing collaboration, streamlining document management, and boosting overall productivity. Currently, the Microsoft SharePoint solution is primarily used in the Fund for the following purposes:

- 1) To facilitate real-time collaboration among employees by providing a centralised space where team members can work on documents without version control issues.
- 2) To integrate and leverage multiple tools for a cohesive working experience.
- 3) To create an intranet website and other internal solutions.
- 4) To create repositories of knowledge that are easily accessible, allowing for collaborative contributions.

3. BUSINESS RISK / CHALLENGES

The project is aimed at addressing the following business challenges:

- 1) **Inefficient Document Management:** One of the primary consequences of not having a structured file plan is disorganisation within document management systems.
- 2) **Compliance and Risk Management Issues:** The lack of a file plan has a high potential to result in significant compliance risks, particularly in industries that are heavily regulated.
- 3) **Hindered Collaboration:** The absence of a cohesive file plan can lead to barriers in collaboration among teams.
- 4) **Increased Operational Costs:** Without a file plan, the organisation may incur additional operational costs due to the inefficiency of misplaced documents and prolonged retrieval times.
- 5) **Poor Knowledge Retention:** The absence of a systematic file plan can also impact knowledge retention within an organisation.

4. GOALS AND OBJECTIVES

GIPF finds it necessary to mitigate the Risk by implementing its file plan on Microsoft SharePoint, based on industry best practices and standards guided by the National Archives of Namibia. The goals and objectives of the project include:

1. Installation and Configuration of the File plan per the requirements and specifications.
2. Developing a Standardised Document Structure for the file plan
3. Enhancing Accessibility and Retrieval of Documents in the Fund
4. Implementing Compliance and Governance Protocols in the Fund
5. Enable Collaboration through Shared Workspaces
6. **Establishing Document Lifecycle Management, including retention schedules and disposition protocols**
7. **Providing Training and Change Management Support** to ensure user adoption

5. SCOPE OF WORK

The following deliverables are included in the scope of work.

1. **Installation and configuration:** Installation and configuration of the GIPF File plan per the requirements and specification (attached).
2. **Establish a Standardised Document Structure:** Development and implementation of a standardised document structure within SharePoint to facilitate consistency and improve the organisation's filing process.
3. **Enhance Accessibility and Retrieval of Documents:** Implementation of improved accessibility and retrieval mechanisms within SharePoint to ensure that all employees can easily find and access necessary documents
4. **Implement Compliance and Governance Protocols:** Establishment of compliance protocols and governance policies that align with legal, regulatory, and organisational requirements for document management.
5. **Facilitate Collaboration Through Shared Workspaces:** Creation of shared workspaces within SharePoint that promote collaboration among teams and departments.
6. **Enhance Employee Training and Adoption:** Development and delivery of comprehensive training programs to enhance employee proficiency in using the File Plan on SharePoint for records management.
7. **Establish a Feedback Mechanism for Continuous Improvement:** Implementation of a feedback mechanism to monitor and assess the effectiveness of the file plan and SharePoint usage regularly.
8. **Project Timeline and Performance Metrics:** Define clear timelines and performance metrics to evaluate the success of the file plan implementation in SharePoint.
9. **Support and Maintenance of the GIPF File Plan Solution.**
 - i. Provision of support and maintenance of the file plan solution for 12 months after project closure.
 - ii. Development and delivery of the Service Level Agreements (SLA).

6. OUT OF SCOPE / EXCLUSIONS

The following deliverables are not included in the scope of work:

- i. Supply and delivery of the Licences.
- ii. Supply and delivery of the Hardware requirements, i.e. Scanners or printers

7. RESTRICTIONS / CONSTRAINTS

- i. The project must be completed at GIPF sites.
- ii. The project must be completed in a period not exceeding 10 months (By March 2026).
- iii. The solution will be configured on an existing Microsoft SharePoint solution.

8. EXPERIENCE AND REFERENCES REQUIREMENTS

- 1. Bidder should have 5+ Years of Experience with Microsoft SharePoint Solutions
- 2. Bidder should have 5+ Years of Experience in implementing File plans and Records Management Systems
- 3. At least 2 Reference Letters for implementing the Microsoft SharePoint solution within the last 2 years, preferably from similar organisations.
- 4. CVs of key team members showing relevant experience and certifications

9. SKILLS AND RESOURCES REQUIREMENTS

- 1. Microsoft SharePoint certifications
 - SharePoint Administrator or equivalent certification
 - Experience with document management system implementation
- 2. Records Management Knowledge:
 - Understanding of file plan development and document lifecycle management
 - Familiarity with National Archives of Namibia standards
- 3. Project Management certifications: (PMP, PRINCE2, or equivalent)

10. MANDATORY DOCUMENTATIONS

All interested parties are requested to submit detailed proposals to the GIPF that must include:

- i. Company profile including company registration details.
- ii. Social Security Commission (SSC) certificate of good standing.
- iii. Namibia Revenue Agency (NAMRA) certificate of good standing.
- iv. Detailed proposed solution and architecture.
- v. Detailed financial proposal.
- vi. Proposed project plan and management methodology.
- vii. Draft Project Contract.
- viii. Draft Support and Maintenance Agreement (SLA)

11. INCURRING COST

The Government Institutions Pension Fund assumes no responsibility or liability for costs incurred by the bidder for work performed in the preparation and production of their proposal or for any work performed prior the signing of a contract.

12. ENQUIRIES

For all bid enquiries, contact the following person:

Ms Julia Shipanga
Procurement Officer
T +264-61-205-1745
E: jshipanga@gipf.com.na

The last date for enquiries will be 28 July 2025.

Business Hours are 08:00 to 16:30 (Monday to Friday).

13. CLOSING DATE AND SUBMISSION OF PROPOSALS

Proposals should be posted or hand delivered in sealed envelopes citing the bid number and detailing the services to be rendered as per details below:

The Chairperson: GIPF Procurement Committee

BID NCS/RFP/GIPF-01/2025: Implementation of GIPF File Plan
GOVERNMENT INSTITUTIONS PENSION FUND
GIPF House, Ground Floor, Reception
Corner Dr Kenneth David Kaunda and Goethe Street
P.O. Box 23500
Windhoek, Namibia

Bidders are responsible for ensuring that their proposal reaches GIPF in good time.

Kindly provide your firm's contact person's details with the bid proposals to facilitate communication with our Procurement Office. Under no circumstances will GIPF be responsible for any late deliveries or loss of bid proposal documents.

Preference will be given to Namibian bidders and/or those with Namibian Partners.

Proposal deadline is **06 August 2025 at 12:00 p.m.**

Proposals received after the deadline will not be considered.
