## Rated Requirements

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Sub-Criteria</th>
<th>Max. points</th>
</tr>
</thead>
</table>
| **R1** Organizational Experience | The bidder should describe its experience by providing two (2) reference projects similar in scope and size to the Project as described in the RFP. Reference projects provided in response to the mandatory requirement above may be re-used in response to this requirement, however the bidder should clearly mark which reference projects it wishes to be considered. The following should be included, at a minimum, for each reference project provided:  
   a) the name and a brief description of the client organization;  
   b) project overview and objectives, including the business need/opportunity;  
   c) start and end date of the project (year and month);  
   d) title and roles of project team members to assess and execute the project;  
   e) a description of the strategy employed;  
   f) a description of the success of the project, including any issues that may have come up and how they were handled by the bidder;  
   g) client reference contact information (including name of contact, title of contact, e-mail address and telephone number). This information will be treated as confidential and used only by WCO to validate the information above.  
   The submitted reference project will be evaluated based on the degree to which they demonstrate experience in the following areas:  
   **Information and Records Management within M365**  
   - Implementing the use of labels to create and deploy document and records management  
   - Engaging business units to perform content discovery and classification on premises before delivering a comprehensive Information Architecture for team sites, libraries, lists, metadata, workflows & forms (will include SharePoint Online, OneDrive for Business, Microsoft Teams.  
   - Creating information governance plans outlining best practices and procedures for the ongoing sustainability of IM & Information Architecture. | 50 pts      |
Leveraging hub and communication sites to deliver a corporate Intranet
• Configuring user-friendly design for easy navigation and organization of corporate content navigation and presentation of corporate content on an Intranet

Data Migration
• Facilitating content cleanup of current SharePoint and network drives and classification on SharePoint Online
• Developing migration strategy and facilitating execution
• Classifying existing documents on-premises to determine where the data should be migrated to (e.g., Highly sensitive data to highly sensitive tagged SharePoint Online sites).

Change Management
• Implementing comprehensive communication and training strategies for SharePoint Online and M365 to help drive user adoption. Training should include but is not limited to:
  o Access to, navigating and settings in the Office Portal
  o M365 online application features such as inserting links instead of files, OneDrive for Business, Microsoft Teams, etc.
  o Azure Information Protection features in O365 applications
• Creating communication and training materials such as Quick Reference Cards and Videos
• Executing communications and training strategy

| R2 | Understanding and Approach | The bidder should describe its understanding of WCO’s requirements and of the objectives as described in the RFP. In this description, the bidder should demonstrate:
  a) a clear understanding of the scope of the project and the requirements necessary to meet the objectives;
  b) a clear understanding of the challenges in planning and executing a migration of documents similar in scope and size to the one set out in the RFP; | 30 pts |
| R3 | Project Team | The bidder should provide the qualifications of each member of their proposed project team. The project team will be evaluated as follows:
  a) The degree of experience of the proposed Project Manager in providing services similar to those described in the RFP
  b) Each of the proposed resources has a minimum of 3 years of experience in an IM/IT environment.
  c) The degree of experience within the proposed team in developing Information Management (IM) strategies for SharePoint-based solutions. | 15 pts |
| R4 | Microsoft Partner | The WCO requires a Microsoft Partner ‘M365 Fast Track Ready’ with at least gold or silver competencies for Collaboration Content, and Security, to implement SharePoint Online | 5 pts |

**TOTAL** 100 pts

**Rated requirements for Option 1 – Contract management**

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Sub-Criteria</th>
<th>Max. points</th>
</tr>
</thead>
</table>
| **R1** Organizational Experience | The bidder should describe its experience by providing one (1) reference project similar in scope and size to the Project as described in the RFP. Reference projects provided in response to the mandatory requirement above may be re-used in response to this requirement, however, the bidder should mark which reference projects it wishes to be considered.  
  The following should be included, at a minimum, for each reference project provided:  
a) the name and a brief description of the client organization;  
b) project overview and objectives, including the business need/opportunity;  
c) start and end date of the project (year and month);  
d) title and roles of project team members to assess and execute the project;  
e) a description of the success of the project, including any issues that may have come up and how they were handled by the bidder;  
f) client reference contact information (including the name of contact, the title of contact, e-mail address, and telephone number). This information will be treated as confidential and used only by WCO to validate the information above.  

**Implementation of the Contract Management**  
- Creating a Contract Management System  
- Implementing dashboards  
- Data integration  
- Trainings that the bidder suggests and plans to undertake |
| **R2** Understanding and Approach | The bidder should describe its understanding of WCO’s requirements and the objectives as described in the RFP. In this description, the bidder should demonstrate a clear understanding of the scope of the project and the requirements necessary to meet the objectives; | 10 pts |

**TOTAL** 20 pts
### Rated requirements for Option 2 – Document Classification

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Sub-Criteria</th>
<th>Max. points</th>
</tr>
</thead>
</table>
| **R1** Organizational Experience | The bidder should describe its experience by providing one (1) reference project similar in scope and size to the Project as described in the RFP. Reference projects provided in response to the mandatory requirement above may be re-used in response to this requirement, however, the bidder should clearly mark which reference projects it wishes to be considered. The following should be included, at a minimum, for each reference project provided:  
  a) the name and a brief description of the client organization;  
  b) project overview and objectives, including the business need/opportunity;  
  c) start and end date of the project (year and month);  
  d) title and roles of project team members to assess and execute the project;  
  e) a description of the success of the project, including any issues that may have come up and how they were handled by the bidder;  
  f) client reference contact information (including the name of contact, the title of contact, e-mail address, and telephone number). This information will be treated as confidential and used only by WCO to validate the information above. | 10 pts      |
| **R2** Understanding and Approach | The bidder should describe its understanding of WCO’s requirements and the objectives as described in the RFP. In this description, the bidder should demonstrate a clear understanding of the scope of the project and the requirements necessary to meet the objectives; | 10 pts      |

**TOTAL** 20 pts