THE UNIVERSITY OF THE WEST INDIES DIGITAL TRANSFORMATION PROJECT

TERMS OF REFERENCE

TO PROVIDE CONSULTANCY SERVICE TO COMPLETE IMPLEMENTATION OF UNIFIED, SEAMLESS COLLABORTION PLATFORM FOR STAFF AND STUDENTS AND MICROSOFT SHAREPOINT AND SECURITY TRAINING FOR THE ONE UWI DIGITAL TRANSFORMATION PROGRAMME

BACKGROUND

The University of the West Indies (UWI) has requested assistance from the Caribbean Development Bank (CDB) in financing the One UWI Digital Transformation programme. The Digital Transformation programme will enable The UWI to implement a shared services operating environment which will enhance the staff experience across the UWI and outline steps on how to create and improve student/staff collaboration. The programme will allow the UWI to provide consistent and reliable services to all stakeholders and will achieve greater operational efficiencies and economies of scale. This digitally-transformed environment will contribute significantly to The UWI achieving its strategic goals as outlined in the 'Triple A' Strategic Plan 2022-2027.

OBJECTIVES OF THE COMPONENTS

The objectives of the components are as follows:
1. To complete the roll out of Microsoft 365 (M365) to staff in a single tenant and design a blueprint of action items that will facilitate integration of both staff and students. A single tenant for staff, faculty and students will result in greater operational efficiency and a seamless secure collaboration environment to support teaching and learning across the entire university.

2. To deliver training with the aim of strengthening skills to securely configure and administer UWI's M365 ecosystem. The training covers two areas MS SharePoint and MS Security. The UWI has established UWI SharePoint Focus Area team which is a sub-group of the M365 Focus Area teams responsible for the roll out of M365 across the University. The members of the SharePoint Focus Area team will participate in the SharePoint training. The MS Security training will be for the UWI Computer Security Incident Response Team (CSIRT) across five (5) campuses.

SCOPE OF SERVICES

The scope will include engaging Microsoft approved Vendor to provide technical guidance and training on the components;
- Complete Roll out of M365; and
- Deliver M365 Training

1. **Complete Roll out of M365**

As part of the fulfilment of these Components, the Consultant(s) shall deliver the following services, based on a schedule to be established:
a. Prepare and facilitate assessment and discovery of environments.
b. Prepare and submit project management documentation for each component.
c. Provide access to the necessary online library of supporting materials to participants.
d. Provide real-time workshops for each implementation of the components above
e. Conduct an evaluation of the project.
f. Provide reports on project actions and timelines established.
g. Report any problems, incidents and concerns relating to the programme.
h. Perform other related work as required
i. Provide weekly project status reports

The implementation will consist of the following components:

A. Shared Service (with UWI M365 Focus Groups)
   - Develop roadmap for running M365 as a shared service
   - Develop transition plan for M365 as a shared service
   - Develop baseline policies and configurations for the following:
       o Governance & Compliance
       o Security & Threat Management
       o Identity & Access Management
       o Device Management
       o M365 Applications
   - Develop capacity to manage shared service in the following areas:
       o Identity and Access
       o Modern Desktop
       o Security
       o Information Protection
       o Teams
       o Power Apps
   - Develop KPIs and SLAs for M365 shared service operations.

- Determine which processes can be automated and self-service used to increase operational efficiency.

B. Identity & Access Management (IAM) Solution
   1. <u>Staff</u>
      - Examine current ERP systems for integration with IAM and provide requirements.
      - Identify and provision resources for IAM solution.
      - Integration of ERP systems with IAM solution
      - Microsoft Vendor Support
   2. <u>Students</u>
      - Create IAM blueprint for student integration into single tenant with staff.
      - Provide IAM sequence of activities for blueprint.

C. Student Migration to a Single Tenant
   - Develop roadmap and plan for each campus to migrate to single tenant.
   - Determine the M365 applications that will be used by students.
   - Determine security controls for each M365 application.
   - Validate security controls for each M365 application.
   - Determine solution for automating the provisioning of identities and M365 groups.
   - Review security controls with UWI Security Team
   - Work with the UWI team to deliver a single student domain with processes for automated enrolment for all campuses.

2. **Deliver M365 Training**
The scope of this component is to provide comprehensive Microsoft training in SharePoint and Security.

A. SharePoint Training:
This training is for the UWI SharePoint Focus Team in the areas listed below. The training shall include certification in the areas listed below:
   Records Management Team Training
   - Microsoft 365 SharePoint Fundamentals
   - Microsoft 365 SharePoint Super User Training Course
   - Microsoft 365 Information Architecture Training Course
   - Microsoft 365 SharePoint Records Management Training Course
   - Records Management Deep Dive
   - Information Asset Owner Training Course
   - Information Governance Training Course

Share Point Technical Team Training
- SharePoint Online Administration certification
- SharePoint Enterprise Content Management certification
- Administration of workload integrations (OneDrive, Teams, Stream, Power Platform) certification
- PowerShell for SharePoint Administrators certification
- SharePoint Custom Workflows certification

B. Security Training
- MS-500 Microsoft 365 Security Administration Certification
- AZ-500: Microsoft Azure Security Technologies Certification
- MS Defender including EDR features

Some of the required Security courses include:

MS-500 Microsoft 365 Security Administration Certification

- Participants will be trained to implement, manage, and monitor security and compliance solutions for Microsoft 365 and hybrid environments. This course will train security administrators to proactively secure identity and access, implements threat protection, manages information protection, and enforces compliance. Additionally, trainees will be equipped with the knowledge to facilitate collaboration with the institution's Microsoft 365 enterprise administrator, business stakeholders, and other workload administrators to plan and implement security strategies.

Certification exams will test attendees in the following areas:

- Implementing and managing identity and access
- Implementing and managing threat protection
- Implementing and managing information protection
- Managing compliance in Microsoft 365

AZ-500: Microsoft Azure Security Technologies Certification

- Participants will be trained to implement, manage, and monitor security for resources in Azure, multi-cloud, and hybrid environments as part of an end-to-end infrastructure. Areas of the training will incorporate the managing the security posture, identifying and remediating vulnerabilities, performing threat modelling, and implementing threat protection.

Certification exams will test attendees in the following areas:
- Managing identity and access

- Securing networks
- Securing computing assets including storage, and databases
- Manage security operations

Microsoft (MS) Defender for Endpoint Training

Participants are expected to acquire the knowledge and skills in:

- Eliminating the blind spots in your environment, that is, discovering unmanaged and unauthorized endpoints and network devices, and securing these assets.
- Discovering vulnerabilities and misconfigurations in real time.
- Automatically investigating alerts and neutralizing complex threats in minutes.
- Applying best practices and intelligent decision-making algorithms to identify active threats and determine what action to take.
- Detecting and responding to advanced attacks with deep threat monitoring and analysis
- Eliminating risks and reducing UWI's attack surface
- Simplifying the organization's endpoint security management

QUALIFICATION AND EXPERIENCE

The selected Vendor(s) must have a proven track record of delivering similar projects to diverse groups and stakeholders with the following minimum qualifications:
- Microsoft Approved Vendor
- Industry-recognized certification in the respective area of training with minimum of five years in a teaching/learning environment.
- Proven track record of implementations in the respective areas as outlined in objectives above.
- Strong spoken and written communication skills and fluency in the English language.

DURATION

The assignment period is comprised of three components as stated below:
a. Complete rollout of M365 - 7 months
b. Deliver M365 Training
       i. SharePoint Training - 8 weeks
       ii. Security Training - 5 days

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