



# **Metropolitan Water Reclamation District Retirement Fund (MWRDRF)**

## **SharePoint - Intranet Development and Content and Document Migration Request for Proposal**

**June 30, 2022**

**Prepared by:  
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## RFP Table of Contents

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## RFP CONTENTS

This table describes the **six** (6) individual sections that make up MWRDRF's Request for Proposal (RFP). Each section has its own table of contents and instructions.

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<b>01 - RFP INFORMATION</b>	Provides information for the Bidder on how to respond to this RFP. This section is for informational purposes only.
<b>02 - MWRDRF INFORMATION</b>	Provides information about the MWRDRF that may assist the Bidder in formulating an accurate solution and proposed cost. This section is for informational purposes only.
<b>03 - BIDDER QUALIFICATIONS</b>	Describes the Bidder's qualifications. This section <b><u>requires</u></b> a response from the Bidder.
<b>04 - METHODOLOGY AND PROJECT SCOPE</b>	Provides detailed scope solution as defined by the MWRDRF. This section <b><u>requires</u></b> a response from the Bidder.
<b>05 - PROPOSED COST</b>	Provides specific instructions for the Bidder on how to present the cost of their solution. This section <b><u>requires</u></b> a response from the Bidder.
<b>06 - ATTACHMENTS</b>	Provides information about the MWRDRF that may assist the Bidder in formulating an accurate solution and proposed cost. This section is for informational purposes only.

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## 01 – RFP INFORMATION

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This section of the RFP provides specific instructions for the Bidder on (1) **how** to respond to this RFP, (2) the **timeline** of the RFP, and (3) bidder **selection process**.

### 010 Purpose of this RFP

#### *001 – Purpose Overview*

Primary goal for the SharePoint Intranet Development and Content and Document Migration Services Project is to select a vendor to assist the Fund with development of a new intranet and migration of on-premises file storage, existing project, and team sites to an Office 365 SharePoint Online platform. Additionally, the Fund seeks to profile, organize, and manage its legacy stored files in advance of migration.

In support of these goals, the Metropolitan Water Reclamation District Retirement Fund (MWRDRF) Board of Trustees (Board) has authorized staff to issue this RFP for the following SharePoint Intranet Development and Content and Document Migration Services Project activities:

- Implement a SharePoint System
- Migrate all identified files
- Provide administrator and user training

Main objectives of the MWRDRF SharePoint Intranet Development and Content and Document Migration Services Project are:

- Make files easier to find
- Make files more secure
- Eliminate redundant and old files
- Standardize file naming
- Automate version control
- Automate backup and recovery
- Provide ability to collaborate offsite
- Share without disclosing Sensitive Information
- Manage records and documents effectively
- Manage the Corporate Calendar

The strategy being used to achieve the above primary goals and main objectives is to replace existing on-premises servers and storage devices with a cloud-based SharePoint solution driven by best practices in the industry that can be adapted to MWRDRF's business needs



## 020 RFP Timeline

This section provides the anticipated timeline of the RFP and bidder selection process.

*Note: MWRDRF reserves the right to change the calendar of events or issue addenda to this RFP at any time.*

### 001 – Projected Timeline

PROJECTED RFP SHAREPOINT SERVICES TIMELINE	
DUE DATE	DELIVERABLE
06/30/2022	RFP Published
07/08/2022	Final date to receive Bidder’s RFP questions
07/15/2022	Publish final answers to written Bidder Questions
07/27/2022	Final Date to Receive Bidder’s Proposals
08/23/2022	Provide Recommendations to the Board
08/24/2022	Present Recommendation for Board Approval
09/16/2022	Best and Final Offer (BAFO) Negotiations and Finalize Contract
10/01/2022	Estimated Project Start

## 030 RFP Instructions

This section provides Bidder instructions for **submitting** a response to this RFP.

### 001 – Response Submissions

The MWRDRF may disqualify a Bidder’s response if any of the following submission criteria are **NOT** met:

1. The **Bidder Proposal Response** document shall be received at the MWRDRF office on or before **5:00 PM Central Standard Time (CST) on July 27, 2022 (“the deadline”)**. Responses received after the deadline will be disqualified.
2. The Bidder shall deliver **all Bidder Proposal Response** documents via email to [wsanchez@provaliant.com](mailto:wsanchez@provaliant.com).
3. Bidder responses, including all data, materials, pricing, and documentation, submitted in response to this RFP shall belong exclusively to the MWRDRF and may be subject to disclosure under Illinois law. Therefore, any submitted information that a Bidder believes to be exempt from public disclosure **must include a clear marking that identifies the specific provision of the Illinois Freedom of Information Act that allows the MWRDRF to withhold the information from the public**. Consistent with its legal obligations, the MWRDRF will consider these markings when determining what information must be released in response to any public record requests.
4. The cost of developing and submitting the response is solely the responsibility of the Bidder. This includes costs to determine the nature of this engagement, preparation of the response, submitting the response, negotiating for the contract, as well as any other costs associated with this RFP process. The MWRDRF will **not** reimburse any firm for any costs associated with the preparation or submittal of any response to this request or for any travel and/or per diem incurred in any presentation of such responses.



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## 002 – Proposal Response Format

Failure to follow these formatting requirements may result in the **disqualification** of the Bidder's response.

The Proposal Response shall be formatted as described below, replacing the text between the <> symbols with the corresponding Bidder information.

The Bidder's Proposal Response shall contain the following two (2) sections in the following order:

- Title Page
  - Table of Contents
    - 01 Executive Summary
    - 02 Vendor Experience with SharePoint
    - 03 Methodology and Project Scope
    - 04 Project Organization and Staffing
    - 05 Cost Proposal
    - 06 References
    - 07 Attachments
1. The first page of the Proposal Response shall be a **Title Page** only (no more than one (1) page) and will state:
    - a. <Bidder's Legal Name>
    - b. Response to the MWRDRF SharePoint Services
    - c. Submitted on <submission date>
    - d. <Authorized representative's printed name>
    - e. <Authorized representative's title>
    - f. Authorized by <signed by at least one individual who is authorized to contractually bind these services>
  2. A **Table of Contents** shall follow the Title Page with six (6) subsections.
    - a. Title the first section of the Proposal Response **01 - Executive Summary**. This section shall contain the Bidder's executive summary of their Response and shall not exceed one (1) page (the front and back of a double-sided sheet are considered two separate pages).
    - b. Title the second section of the Proposal Response **02 – Vendor Experience with SharePoint**.
    - c. Title the third section of the Proposal Response **03 – Methodology and Project Scope**.
    - d. Title the fourth section of the Proposal Response **04 – Project Organization and Staffing**. This section contains resumes and biographies for the project team
    - e. Title the fifth section of the Proposal Response **05 – Cost Proposal**. This section contains the Bidder's itemized costing for the project, including all one-time and recurring costs.
    - f. Title the sixth section of the Proposal Response **06 – References**.

The following are **format requirements** for the **entire** Proposal and Cost Response:

- a. The text on all pages must be Arial 10 font (titles and other subjects can have larger font).
- b. The text on all pages of the Bidder's Proposal and Cost Response shall use **double** spacing.
- c. Every page of the Bidder's Proposal and Cost Response shall contain the Bidder's legal name in the header.



- d. Every page of the Bidder's Proposal and Cost Response shall contain "Page <page number> of <total pages>" and <submission date> in the footer.
- e. Use of the Bidder's company logo and tagline is permitted throughout the Proposal and Cost Response.
- f. The Proposal and Cost Response must be presented using the same numbering and ordering sequence used in this RFP or as otherwise specified.

Failure to follow these Proposal and Cost Response formatting instructions may result in the **rejection** of the Bidder's response.

### **003 – Cost Response Format**

The following are the formatting requirements for the 05 – Cost Proposal section only. This includes Time and Materials detail proposed cost for the SharePoint Services Project, as well as other costs requested by the MWRDRF.

Failure to follow these formatting requirements may result in the **disqualification** of the Bidder's response.

The cost response shall be formatted as described below, replacing the text between the <> symbols with the corresponding Bidder information.

The Bidder's **05-Cost Proposal** section shall contain the following **three** (3) sub-sections organized in the following order:

- 001 – Cost Details
  - 002 – Proposed Payment Schedule
  - 003 – Change Control
1. Title the first subsection of the Cost Proposal **001 – Cost Details**.
  2. Title the next subsection of the Cost Proposal **002 – Proposed Payment Schedule**.
    1. The proposed payment schedule should reflect the duration of the **total proposed cost**.
    2. Include an example of how the warranty and support would be billed.
    3. All payments need to be associated to a physical deliverable and only when that deliverable is 100% completed as determined by the MWRDRF.
  3. Title the next subsection of the Cost Proposal **003 – Change Control**.

Note: Proposed costs must be approved by an officer of the firm that has the ability to bind the company to such amounts and that they are binding for at least one year from the date of the submission.

### **004 – Point of Contact**

From the issue date of this RFP until a Bidder is selected and a contract is executed and approved, Bidders are not allowed to communicate with any MWRDRF staff, Retirement Board Members or contractors working for the MWRDRF regarding this procurement except for the designated point of contact.

The Bidder shall **only contact** RFP Project Manager, Wendy Sanchez, as follows:

- RFP Clarification Questions (e-mail only) – **No text nor phone calls are allowed**
- Negotiations for BAFO
- Contract signing

The **only** point of contact for this RFP is:





Wendy Sanchez, Sr. Project Manager  
E-mail: [wsanchez@provaliant.com](mailto:wsanchez@provaliant.com)

The Bidder is not allowed to contact any vendor already contracted with the MWRDRF for questions or information related to the MWRDRF or this RFP.

Failure to follow these Point of Contact instructions may result in the **rejection** of the Bidder's response.

### 005 – Response Provisions

When responding to this RFP, Bidders should take note of the following provisions:

- a. The MWRDRF reserves the right to request additional information from Bidders responding to this RFP. Additionally, upon reviewing the RFP responses, the MWRDRF may have certain Bidders make oral presentations.
- b. The MWRDRF reserves the right to reject any and all responses to this request, to waive any minor informality in a response, to request clarification of information from any responding Bidder, and to enter into any agreement deemed by the MWRDRF to be in the Fund's best interest with one or more of the Bidders responding.
- c. The MWRDRF reserves the right to amend or cancel this RFP at any time.
- d. All responses and their contents submitted in response to this RFP shall become the property of the MWRDRF and will not be returned to the Bidder. Bidders are cautioned that ideas, techniques, information, and so forth that are submitted as part of the Bidder's response may be used by the MWRDRF without separate payment to the Bidder or its subcontractors.
- e. The MWRDRF will **not** reimburse any firm for any costs associated with the preparation or submittal of any response to this request or for any travel and/or per diem incurred in any presentation of such responses.
- f. The duration of the contract entered as a result of this RFP will be for the period of time planned for the new SharePoint Intranet Development and Content and Document Migration Services solution, as agreed upon during final contract negotiations unless extended by the approval of MWRDRF.

Failure to follow these provisions may result in the **rejection** of the Bidder's response.

### 006 – Disqualification of Responses

Reasons for disqualification of responses include but are not limited to:

- a. **Late Proposals.** Proposals that are received after the deadline date and time shall be automatically disqualified.
- b. **Nonresponsive Proposals.** Proposals that are not responsive or fail to comply with mandatory requirements of the RFP shall be deemed nonresponsive and shall be disqualified. Nonresponsive proposals shall include but not be limited to those that fail to address or meet any mandatory item.
- c. **Collusion.** Collusion by two or more Bidders agreeing to act in a manner intended to avoid or frustrate fair and open competition is prohibited and shall be grounds for rejection or disqualification of a proposal or termination of a contract.



- d. **Debarred Bidders or Subcontractors.** A Bidder that is currently subject to any State of Illinois or federal suspension or debarment order or determination shall not be considered for evaluation by the Selection Review Committee (SRC). If a Bidder's proposal is dependent upon the services of a named subcontractor and the disqualification of that named subcontractor would materially alter the proposal, then that proposal shall be deemed unresponsive if the named subcontractor is found to be suspended or debarred. Proposals that indicate that subcontractors will be used but do not rely on any specifically named subcontractor shall not be deemed unresponsive if the disqualification of a proposed subcontractor will not materially alter the proposal.

## 040 RFP Questions and Answers

This section provides instructions on (1) how to submit questions concerning the RFP, (2) the deadline for submitting questions, and (3) how the MWRDRF will respond to the questions.

### 001 – Submitting Questions

Bidders may submit questions concerning this RFP to the contact person, Wendy Sanchez.

**All** questions must be compiled and submitted in a Word document. Bidder's must submit **one** (1) email containing all the Bidder's questions. If follow-up questions arise, the questions should be addressed to Wendy Sanchez. The Fund will take them under consideration if time permits and based on the merit of the question.

#### **E-Mail Format:**

**a. Email Questions to:**

RFP Project Manager, Wendy Sanchez, at [wsanchez@provaliant.com](mailto:wsanchez@provaliant.com)

**b. Email's Subject Line:**

Use following format:

<BIDDER'S NAME>: MWRDRF SHAREPOINT SERVICES RFP Questions

**c. Body of E-mail:**

1. <At the beginning of the e-mail>  
Bidder's legal name and address
2. <At the end of the e-mail>  
Bidder's **primary contact** name, cell phone number, and e-mail address
3. <At the end of the e-mail>  
Bidder's **backup contact** name, cell phone number, and e-mail address

**d. Attached File to the Email:**

Attach the file to the email with the following file name format:

<BIDDER'S NAME>: MWRDRF SharePoint Intranet Development and Content and Document Migration Services RFP Questions



**Question Format :**

- a. For each question, first (1), list the name of the RFP Section, second (2), list the name of the RFP Subsection(s), and lastly (3), list the RFP page number (#), see below.

Format:

*RFP Section Name: RFP Subsection(s) Name, pg. ##*

Example:

*03 – Bidder Qualifications: 020 Phase Two Evaluation – Proposed Solution: 001 – Company Information, p. 10*

*1. What if our company has no unique qualifications? Should we just put N/A?*

- b. Number (#) each question including any additional clarification questions or text.

**002 – Deadline for Question Submissions**

The deadline for submitting questions is **5:00 PM Central STANDARD Time (CST) on July 8, 2022.**

**050 RFP Evaluation Criteria**

This section provides the evaluation criteria that will be used to evaluate each Bidder's response.

**001 – Evaluation Criteria**

The RFP Evaluation Process will be conducted in three (3) phases. After completion of the Phase Three Evaluation, the SRC will make a vendor selection recommendation to the MWRDRF Board who will then accept or reject the recommendation.

**Phase One Evaluation:**

In this phase, Bidder's Proposal Response will be evaluated based upon the ability of the bidder to satisfy the requirements and perform the requested services. All responses will be evaluated using the Bidder's Proposal Response. Please be aware that if any Bidder does not meet Phase One evaluation, the MWRDRF staff reserves the right to allow that Bidder to cure.

**Phase Two Evaluation:**

A Cost Score for each Bidder's Cost Response scenario will be calculated.

**Phase Three Evaluation:**

After completion of the Phase One and Phase Two, the SRC may invite selected Bidder(s) for oral presentation. The selected Bidders shall present their solutions and services, and a demonstration of their solution and services. Selected Bidders will not be informed of their rank at the time of the oral presentations.



The time allotments and the format shall be the same for all oral presentations. The SRC will give notice at least **five (5) business** days prior to the date of an oral presentation. **The SRC will require the Bidder's assigned key personnel to conduct the oral presentation.**

A Bidder is limited to the presentation of material contained in its Proposal, with the limited exception that a Bidder may address specific questions posed by the SRC or provide clarification of information contained in its Proposal. No discussion of cost information will be permitted. Any correction or modification of the Proposal or the presentation of supplemental information shall be considered prejudicial to the interests of other Bidders and fair competition and shall not be permitted. A Bidder's attempt to submit such corrections, modifications, or supplemental information during an oral presentation may subject the Bidder's Proposal to disqualification. A Bidder's failure to agree to an oral presentation may result in disqualification from further consideration.

*Note: These oral presentations may be modified to virtual as the MWRDRF sees fit.*

### 002 – Awarding of Work

Upon final evaluation, the MWRDRF shall award the work to the Bidder whose response, in the MWRDRF's opinion, is most advantageous to the MWRDRF. Upon identification of the apparent successful Bidder, the MWRDRF shall enter into a **Best and Final Offer Process (BAFO)** and contract negotiations with that Bidder. **Should contract negotiations fail, the MWRDRF reserves the right to enter into negotiations with another Bidder.**

The MWRDRF has the right to reject any and all bids not in the best interests of the MWRDRF. The MWRDRF may cancel this Request for Proposal or reject responses at any time prior to an award and is not required to furnish response scoring or a statement of the reasons why a particular response was not deemed to be the most advantageous to the MWRDRF. Procurement information is available only as provided through an Illinois public records request.

Should the MWRDRF determine in writing and in its sole discretion that only one Bidder is fully qualified or that one Bidder is clearly more highly qualified than the others under consideration at any time during this process, that Bidder will be identified as the apparent successful Bidder pending successful contract negotiation, and a contract may be negotiated.

The contract shall serve as the award document and incorporate by reference all the requirements, terms, and conditions of the solicitation and the Bidder's response as negotiated.

## **060 Contractual Terms and Conditions**

### 001 – Sample Contract

The MWRDRF requests that the bidder to provide a sample contract used to implement the services described in the Scope of Work in this RFP. The sample contract should include language for:

- Non-Disclosure Agreement (NDA),
- Master Services Agreement (MSA), and
- Service Level Agreement (SLA).

### 002 – Ethics in Public Contracting

By submitting their proposals, Bidders certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other bidder, supplier, manufacturer, or subcontractor in connection with their proposal, and that they have not conferred on any public employee having



official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.



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## 02 – MWRDRF INFORMATION

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This section of the RFP provides an overview of the MWRDRF.

### 010 MWRDRF Overview

This section provides general information about the MWRDRF such as its organizational structure, membership, plan size, and legislative interaction.

#### 001 – MWRDRF Overview

The MWRD Retirement Fund (MWRDRF) is a defined benefit, single employer benefit plan that was established in 1931 by an act of the Illinois General Assembly under Article 13 of the Illinois Pension code [40 ILCS 5/13-101 et seq.] to provide disability and retirement benefits to qualified employees of the Metropolitan Water Reclamation District of Greater Chicago (MWRDGC). We pay earned benefits to our members, which are funded by a combination of member contributions, employer contributions, and investment earnings from Fund reserves. The MWRDRF is a component unit of the MWRDGC, and as such, is included in the MWRDGC's financial statements as a pension trust fund.

#### 002 – Mission

At the direction of the Retirement Board, our mission is to provide earned benefits to the Fund membership with excellent customer service and to preserve the fiscal integrity and financial stability of the Fund.

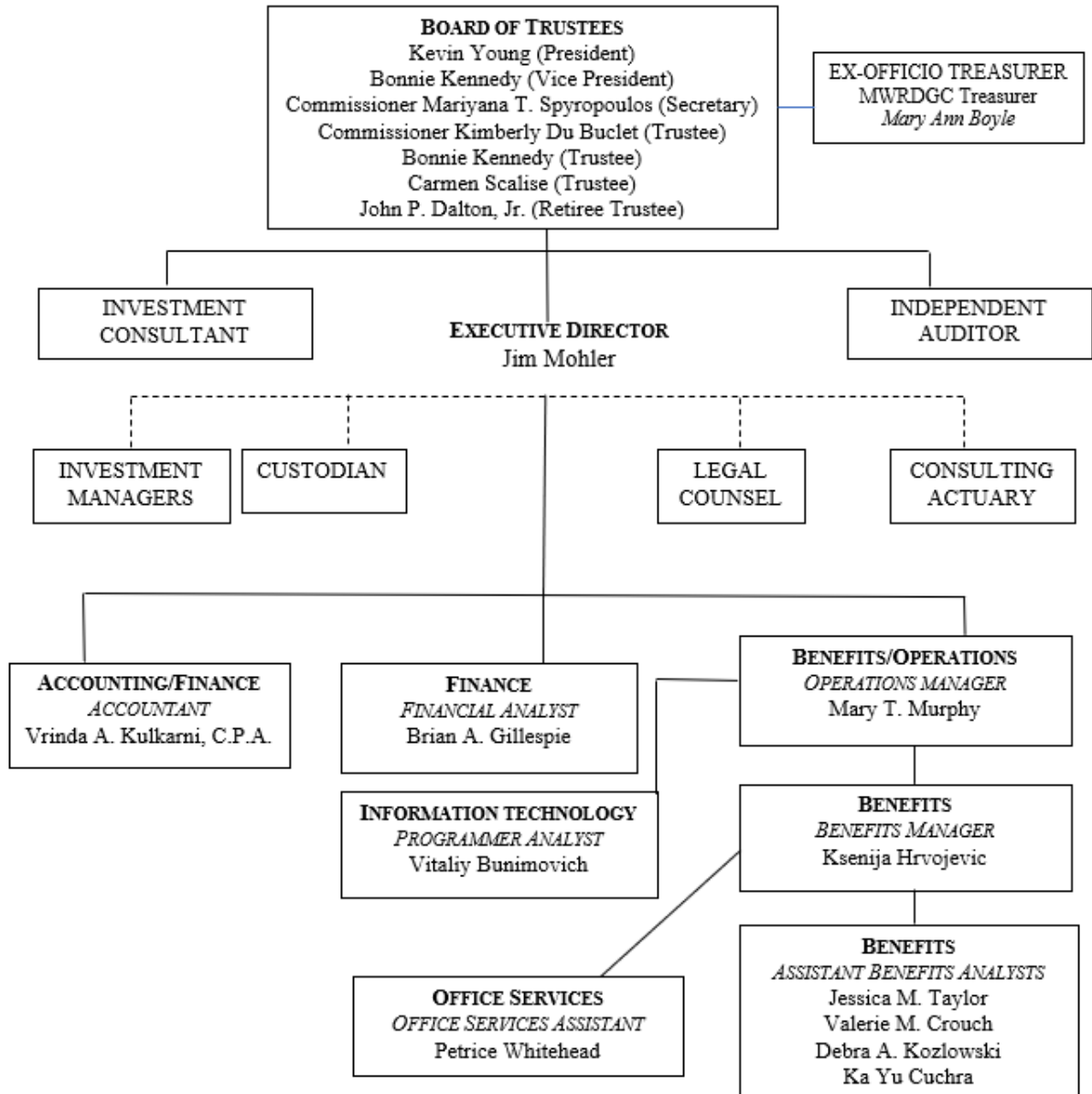
#### 003 – Administration

An elected and appointed, seven-person, board of trustees, governs the MWRDRF. Two members of the Board are appointed by the MWRD's Board of Commissioners. One is a retiree trustee recommended by the MWRD Board of Commissioners and approved by the Retirement Board. The remaining four members of the board are elected by active Fund members. The appointed Board members and the retiree member serve three-year terms. The elected Board members serve four-year terms. By statute, the MWRDRF is defined as a "body politic and corporate" created by Article 13 of the Illinois Pension Code. The MWRDRF currently employs ten (10) staff. A copy of the MWRDRF's most recent Annual Financial Report (AFR) is available for review, or to download, at [www.mwrdrf.org](http://www.mwrdrf.org). The Illinois Governmental Ethics Act, 40 ILCS 420, provides guidelines for ethical practices concerning state and local pension plans. Respondent providers should be familiar with the provisions of this Act.



004 – Organization

**ORGANIZATIONAL CHART**  
As of: June 9, 2022



\_\_\_\_\_ Full and direct authority and responsibility.  
 - - - - - Appointment by the Board of Trustees, direction and coordination by the Executive Director.



**005 – Resources Constraints**

Staff participating in the SharePoint Intranet Development and Content and Document Migration Services Project:

<b>MWRDRF Staff</b>	<b>Title</b>	<b>Responsibility</b>
Jim Mohler	Executive Director	Liaison to the Board, authorized contract signatory.
Mary (Wilson) Murphy	Operations Manager	Business decisions, project coordinator.
Ksenija Hrvojevic	Benefits Manager	Business user, content owner for a substantial portion of the Fund's shared file library. (SME)
Vitaliy Bunimovich	Programmer Analyst	Technical lead, Office 365 administrator.

Staff availability by month.

<b>MWRDRF Staff</b>	<b>% Of Time Available: <u>September</u></b>	<b>% Of Time Available: <u>October</u></b>	<b>% Of Time Available: <u>November</u></b>
Jim Mohler	15%	15%	15%
Mary (Wilson) Murphy	60%	60%	60%
Ksenija Hrvojevic	35%	35%	35%
Vitaliy Bunimovich	25%	25%	25%





### 03 – BIDDER QUALIFICATIONS

This section of the RFP provides specific sections that require a Bidder Response.

#### 010 Company Information

Bidder shall provide information on their (1) organization, (2) history, (3) total number of staff, (4) locations, and (5) strategic partnerships.

##### 001 – Company Overview

The Bidder shall provide a general company overview. Please limit the discussion to no more than **two (2)** pages.

##### 002 – Diversity Table

Bidders must use the following table format in their response.

Titles	Male	Female	Total	Caucasian	African American	Asian	Hispanic	Disabled	Other	Total
Senior Executives / Mgmt.										
Senior Developers / Analysts										
Developers/Analysts										
Sales / Marketing & Client Services										
Project Managers										
Software Architects										
Other Non-Professionals										
Total										
From the above, how many are Veterans? _____										



## 020 Qualifications

Bidder’s response must demonstrate that any Bidder interested in proposing a solution for the work defined in this RFP possesses the following Qualifications:

1. Bidder shall provide reference information for **three (3)** clients where services provided in the past **two (2)** years.

COMPANY REFERENCES	
<b>Client Name:</b>	<name of the client>
<b>Project Name:</b>	<name of the project>
<b>Project Contact Name:</b>	<full name of the reference contact person that has firsthand knowledge of Bidder’s performance on the project>
<b>Project Contact Title:</b>	<title of the reference contact person that has firsthand knowledge of Bidder’s performance on the project>
<b>Project Phone Number:</b>	<work phone number of the reference contact person>
<b>Contact E-mail Address:</b>	<work e-mail address of the contact person>
<b>Contact Person’s Role:</b>	<provide information on the contact person’s role in the project, including length of time on the project>
<b>Project Start Date:</b>	<date that Bidder began working on the project>
<b>Project End Date:</b>	<date the Bidder finished working on the project or is planning on finishing work on the project>
<b>Project Objectives:</b>	<description of the objectives of the project>
<b>Project Outcomes:</b>	<description of the project outcomes. Did the project achieve its objectives?>
<b>Project Changes:</b>	<description of any significant changes to scope, schedule, cost, or quality that occurred during the Bidder’s work on the project>

## 030 Litigation and Other Proceedings

Bidder shall provide information on any litigations or legal proceedings involving the company.

### 001 – Litigation Information

- a. Bidder shall list in their proposal any final judgments entered against the Bidder within the last **three (3)** years. In addition, Bidder shall list all current or pending litigation against the Bidder, including case name, summary, and court in which the litigation is pending.
- b. Bidder shall list all investigations of Bidder by any regulatory body within the last **three (3)** years, indicating the dates and any resulting fines or other penalties.
- c. Bidder shall list any formal protests or other actions against Bidder within the last **three (3)** years, indicating the dates and the outcomes.

All litigation information must be listed in a single Word document.

**If bidder does NOT have any litigations to disclose, then the Bidder’s must respond as follows:**

**“<Bidder’s Name> does not have any litigations to report”**



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## 04 – METHODOLOGY AND PROJECT SCOPE

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This section of the RFP provides specific sections that require a Bidder response and instructions for the Bidder on how to respond to each section.

The following section specifies the scope for the Bidder's solution, methodology, and support. The MWRDRF is seeking a SharePoint Intranet Development and Content and Document Migration Services solution which will be configured to meet MWRDRF needs. Thus, this section outlines what the Bidder's proposed solution, methodology and support shall accomplish, NOT how the Bidder's proposes to implement the scope. The "how" will be explained by the Bidder in their proposal and is one of the main scoring considerations for the MWRDRF's selection of the winning Bidder.

**The scope is mandatory**, unless otherwise indicated. The Bidder shall indicate if they "**take exception to**" or "**will not satisfy**" any of the scope for any reason. If the Bidder takes exception, they must enter the exception explanation in the Bidder's Exception table below.

**If the Bidder takes no exception to a requirement, then the Bidder agrees to completely satisfy the scope of this RFP.**

### 010 Bidder's Solution Methodology

#### 001 – General Information

Bidder shall provide general information about their solution being proposed to the MWRDRF. The MWRDRF expects the topics covered in this section to be vendor- and solution-specific, and thus the format of this subsection is not specifically defined except that the total should not exceed **two (2)** pages.

While the topics for this subsection should be decided by each Bidder, the MWRDRF expects the responses to this section to answer the following question at a minimum:

- a. What were the basic assumptions used when designing the proposed solution?

#### 002 – Implementation Process

The MWRDRF is interested in obtaining a solution designed from the business user's point of view. Therefore, the Bidder shall provide a description of their process for the following processes:

- The process for how you identify and allocate metadata.
- The process for MWRDRF staff to create and update security roles.
- The process to train MWRDRF's staff.
- The process for how your implementation process manages file migration.
  - Describe how you manage duplicate files
  - Describe how you manage files with different versions

The response should be clear and concise. Any non-necessary information may result in points deducted. The Bidder shall limit the discussion to **five (5)** pages.



## 020 General Scope

The MWRDRF requires the bidder to implement a system to incorporate content management that will assist MWRDRF staff to work together seamlessly in the office or remotely. The solution will provide for document management such as file versioning, storage, co-authoring documents and spreadsheets, file retention rules, user profiles, and access rules.

The list below represents the MWRDRF SharePoint Design and Migration Services scope areas. In each area, the MWRDRF is looking for a solution to provide process efficiency, workflow, audit, security, and approvals.

1. MWRDRF SharePoint Homepage:
  - Special view for Board Members – Access for Public Meeting & Executive Session (Restricted) Documents
  - Quick Links for frequently visited sites – internal and external
  - Reminders – Interactive by name, description, due date, and notes
  - Prioritized Tasks
  - Staff Documents – taxonomy/metadata
  - Recent Documents – Including preview
  - Interactive Events Calendar
  - Comments Section for users
2. Departmental document management solution, which will include structure and taxonomy for each department.
3. Provision of a sitemap and color palette
4. Work progress tracker – demonstrating working items and tracking tasks
5. Issue tracker for strategic analysis
6. Fully functional and sharable SharePoint site ready for data and content migration

## 030 Detailed Scope

### 001 – General Requirements

The Requirements stated in this section pertain to the SharePoint Intranet Development and Content and Document Migration Services technical solution, as a whole.

- Create a SharePoint file management system that best suits MWRDRF's business needs based on the MXO prototype. See Attachment: "SharePoint Prototype"
- Assist with file migration
- Assist with identifying old, duplicate, draft files when there is a final document
- Provide a strategy for handling old database backups and other large files
- Provide file storage for archived files
- Streamline and improve file storage and versioning
- Establish governance for the creating and maintaining the intranet, private sites, and user profiles.
- Establish an index of metadata and key information.
- Search & Search Results
  - Search capabilities available to users from all intranet pages, user profiles and private sites.
  - Full file search for all supported content types including Office documents (Word, PowerPoint, Excel), PDFs, content from SharePoint Sites, and images (for example jpg and png files),
  - Search for synonyms and key matches.
  - Search Index



- Usable search results that combine out-of-box search results
- Provide an administrator capacity to manage intranet homepage content function, and the pages' look and feel.
- Reporting
  - Analytics of user access and usage of pages, links, and documents
  - Full audit trail capabilities on user actions
- Workflows
  - Automate workflow for managing and tracking processes
- Provide backup methodology
- Provide security, data integrity, and internal controls
- Provide user groups
- Provide end-user training
- Provide Administrator training
- Leverage the Fund's existing prototype SharePoint intranet design
- Provide One-drive migration and storage for staff personal drives
- Provide external parties secure access to specific content as permitted by authorized MWRDRF users

### 002 – Security Requirements

1. Ensure that user groups and access permissions are as restricted, as necessary.
2. Require multi-factor authentication for logging into the SharePoint intranet.
3. Require the user to log in again if they are inactive for x (parameter) period of time.
4. Comply with or exceed MWRDRF security policies (Attached)
5. Bidder may propose individual(s) with certifications from Microsoft, relevant for SharePoint migration.
6. Business continuity and Disaster Recovery management.
7. Protect against SharePoint zero-day exploits and other vulnerabilities
8. Providing for SharePoint updates

### 003 – Bidder's Methodology and Execution Requirements

1. Shall provide environment readiness guidelines for the Fund to assist the Fund in procuring and infrastructure requirements to build the SharePoint environment.
2. Shall provide a project plan to stage and migrate files. The MWRDRF intends to improve upon our existing file storage organization and contents. The current file storage organization will not be duplicated in the SharePoint environment.
3. MWRDRF desires a bidder with a proven, clear implementation methodology, a process for mitigating known risks and identifying potential unknown risks, and a detailed project work plan that addresses project management best practices. In addition, the implementation must address the following:
  - a. Project Management – MWRDRF is seeking bidders which follow project management best practices, specifically as related to identifying and managing resources and risks.
  - b. Information Architecture – MWRDRF is seeking bidders who follow knowledge management and information architecture best practices.
  - c. Migration – MWRDRF desires bidders who follow migration best practices while considering individual clients and migration rules.
  - d. Testing – MWRDRF desires a project work plan with clear deliverables and tasks, along with resources, for testing, managing, and resolving issues identified during test cycles.
  - e. Go-live planning. The bidder should present its plan for go-live to the SharePoint environment from the existing environment.
  - f. Training – MWRDRF desires onsite training for site owners of the Solution in preparation for automated and manual content migration and for all staff of the end-Solution in preparation for rollout. Training to be customized as appropriate for MWRDRF's Solution



and provides end users with MWRDRF specific training documentation and reference information to Microsoft's training.

4. Shall provide a project schedule with milestones align with the I proposed payment schedule deliverables including detailed tasks with MWRDRF resources identified prior to starting the project.
5. Shall produce a weekly dashboard status report to the MWRDRF.
6. Shall provide a formal structured Change Requests (e.g., scope, schedule, resources).

#### 004 – Testing Requirements

1. Bidder shall provide their approach to compare and validate the source and target environment post migration
2. Shall create a testing checklist for pre- and post- migration.
3. Upon completion of testing, bidder shall provide a Test Evaluation Summary that should provide the expected results and test results.
4. Shall provide a methodology for tracking defects
5. Shall conduct security testing for all solution user types, including users with multiple roles, to validate the solution authentication and authorization processes.
6. Shall resolve all catastrophic and major problems encountered during migration and testing.

#### 005 – Solution Warranty Requirements

1. Shall provide a 30-day warranty period (see definition below) for issues and defects that are revealed after implementation. All defects, regardless of severity or priority identified in the 30-day period shall be corrected under this 30-day warranty at the bidder's expense.

**Warranty** – “Warranty” means any work that is required as a result of a warranty commitment by the Bidder. Warranty work shall be done at the vendor's expense and shall not diminish the Bidder's post-SharePoint Migration support work effort.

**Defect** – “Defect” means work that does not conform to requirements specifications.

### **040 Bidder's Project and Change Control Methodology**

The Bidder shall provide an overview of the project management and change control methodology, they intend to use on this project.

#### 001 – Project Management Methodology Overview

The Bidder shall provide a description of the project methodology they intend to use limit to **two (2)** pages.

1. What are the key reasons for choosing the specific implementation methodology?
2. How has the Bidder's previous experience (lessons learned) been applied to the methodology proposed?
3. The Bidder shall list their methodology deliverables, their purpose, and generally when the Bidder will produce the deliverables.
4. The Bidder shall describe the tool(s) they intend to use to support this process.

#### 002 – Change Control Methodology Overview

The Bidder shall provide a description of the methodology they intend to use to manage out-of-scope changes requested by MWRDRF limit to **two (2)** pages.



## 050 Bidder’s Project Team

The Bidder shall provide a description of the (1) entire project team, (2) the name of the project’s key team members, and (3) their résumés.

### 001 – Project Team

The Bidder shall provide an organizational chart of the project team, as follows:

- a) The organizational chart must include:
  - i. Team member’s name
  - ii. Role
  - iii. Responsibilities
  - iv. Project Hierarchy
- b) Identify **all** key team members (e.g., Developer, Account Manager, Project Manager, Testing and/or QA Manager, and Key Business Analysts)
- c) Identify who is the single point of contact for any issues during and post-SharePoint Intranet Development and Content and Document Migration.

Bidder staff must have strong verbal and written communication skills. The Bidder may use limited offshore resources for development, but the offshore resources shall be transparent. At no time shall MWRDRF interface with offshore staff.

*Note: “On-site” may be modified to “remote work” as MWRDRF sees fit.*

#### Remote Work Policy

- If in different time zones the bidder staff must be available during the MWRDRF’s work hours, 8:00 a.m. – 4:30 p.m. (Central Standard Time “CST”) Monday through Friday.
- Limited VPN access will be provided as need basis only.

*Note: this is not an inclusive list, and it is subject to change.*

### 002 – Résumés

The Bidder shall provide the résumés of their **key** resources. Résumés are limited to **one** (1) page per key resource.

Bidders must use the following table format in their response.

SharePoint Intranet Development and Content and Document Migration Project Team					
Project Resource Full Name:	Role/Title:	Years’ Experience in the Role Proposed:	Total Years’ Experience:	Years with <BIDDER NAME>:	Experience with SharePoint (# Years):

### 003 – Participation in Orals

If the Bidder is selected as a finalist, MWRDRF may ask the Bidder to provide a presentation of their solution. It is expected that all “**Key Resources**” will be the only presenters.



## 060 Bidder’s Project Strategy and Schedule

The Bidder shall provide a description of their SharePoint Intranet Development and Content and Document Migration strategy and schedule.

### 001 –Project Strategy

The Bidder is free to propose a SharePoint Intranet Development and Content and Document Migration strategy that they feel best ensures the success of the project. The Bidder shall provide an explanation of their reasoning for the proposed strategy limit to **five (5)** pages. The bidder **must** consider MWRDRF’s staff constraints identified in this RFP.

### 002 –Project Schedule

The Bidder shall provide the SharePoint Intranet Development and Content and Document Migration schedule for the project and their best-case start date. The bidder shall create their schedule around the MWRDRF resource constraints identified in this RFP.

The SharePoint Intranet Development and Content and Document Migration project schedule must include:

- Name of major tasks (**must** include deliverables that will require MWRDRF sign-off)
- Start and Finish date
- Duration of the major tasks
- Key Milestones (for example, training, UAT, Go-Live)
- Resources Name – Need to specify either “bidder” or “MWRDRF” (if, MWRDRF provide the role and estimated hours)
- Project Role
- Estimated Hours for the task

Bidders must use the following table format in their response.

SHAREPOINT INTRANET DEVELOPMENT AND CONTENT AND DOCUMENT MIGRATION PROJECT SCHEDULE								
Task Name	Start Date	End Date	Duration	Key Milestone	Resource Name	Project Role	Est. Hours	Other

## 070 Bidder’s Exceptions

The Bidder shall specify any exceptions to any of the mandatory scope specified in this RFP. The Bidder shall describe any alternative to the stated requirement as long as it meets the intent and spirit of the requirement. Alternatively, the Bidder shall state that they have no proposed alternative.





001 – RFP Exceptions

Using the format in the following table, the Bidder shall provide the details to each exception they have to the mandatory scope found in this RFP. Bidders must use the following table format in their response.

#	RFP Section	Page Number (#)	Description of the Exception	Explanation for the Exception	Bidder's Proposed Alternative



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## 05 – PROPOSED COST

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This section of the RFP has specific sections that require a response and provide instructions for the Bidder on how to respond to this section.

### 010 Proposed Cost

The proposed cost should have **two (2)** main sections as follows:

#### 001 – Proposed Estimate Payment Schedule

This section will provide a proposed schedule of payments for accepted project milestones.

MWRDRF would like to provide a time and materials contract. The hourly rate is inclusive of all charges, thus there will be no additional charges to MWRDRF for travel, materials or other any other expenses.

Proposed costs must be approved by an officer of the firm that has the ability to bind the company to such amounts and that they are binding for at least one year from the date of the submission.

#### 002 – Post- SharePoint Migration Support Hourly Rates

This section will provide hourly rates post migration.

#### **NOTE:**

The MWRDRF **will not pay any invoice based on partial completion** of deliverables, the passage of time, or travel costs and related expenses incurred by the Bidder.

The MWRDRF does not pay the Bidder travel costs or other related expenses. These costs should be incorporated into the proposed bid and should be inclusive of all Bidder expenses.

Bidder should not include cost for MWRDRF staff in the proposed cost.



### 020 Proposed Estimated Payment Schedule

The Bidder is to provide their proposed estimated project payment schedule.

#### 001 – Proposed Estimate Payment Schedule

Bidders must use the following table format in their response.

PROPOSED ESTIMATED PAYMENT SCHEDULE								
Milestones Name	Start Date	End Date	Duration	Resource Name	Project Role	Hourly Rate	Est. Hours	Total Cost
							<b>Total Price**</b>	

The proposed estimated payment schedule **must align** with the Bidder’s proposed implementation schedule for all deliverables MWRDRF has to sign-off.

### 030 Post- SharePoint Migration

#### 001 – Post- SharePoint Migration Hourly Rates

Please provide the hourly rates by roles for post-production change requests.

Bidders must use the following table format in their response.

Role Title/Name	Rate (\$)



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## 06 – ATTACHMENTS

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This section of the RFP provides the attachments referenced in the previous sections.

### 010 Attachment

- SharePoint Prototype color palette
- SharePoint Prototype Site Map
- SharePoint Prototype Screen Shots
- MWRDRF's current user and user group information
- Information on the MWRDRF's file storage environment