



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

## ANSWERS TO BIDDER'S QUESTIONS

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### 01 – RFP INFORMSTION: 010 Purpose of this RFP 001 – Purpose Overview, pg. 4

1. What version of SharePoint are you currently using? **The current Office 365 version.**
2. How much data (size) is in the on-prem file storage moving to the Intranet? **Refer to the attachment. If you need the attachments, please contact Wendy Sanchez of Provaliant by email at [wsanchez@Provaliant.com](mailto:wsanchez@Provaliant.com). One of the project goals is to profile and designate files for migration, archiving, or destruction.**
3. How many Project sites and total data size is moving? **See the table below for a current list of Sharepoint sites, all are Teams or Communication sites, not integrated with MS Project or Project Online:**

Site name ↑ ▾	URL ▾	Teams ▾	Channel sites ▾	Storage used (GB) ▾
Communication site	<a href="https://mwrdrpb.sharepoint.com">https://mwrdrpb.sharepoint.com</a>	-	-	0.00
Cyber Security Policy Sandbox	.../sites/CyberSecurityPolicySandbox		-	0.08
Data Management Project	.../sites/cleandata		-	5.00
Data Management Services	.../sites/DataManagementServices	-	-	0.04
IT Resources	.../sites/ITResources	-	-	0.00
IT Support	.../sites/ITSupport		-	0.91
IT Work Tracking	.../sites/ITWorkList	-	-	0.03
Portfolio	.../sites/Portfolio	-	-	0.00
Retirement Fund Staff	.../sites/RetirementFundStaff		-	0.00
Retirment Notifications	.../sites/RetirmentNotifications	-	-	0.00

4. How many departmental sites need to move and total data size? **None. The departmental sites need to be created. Existing documents associated with the department will need to be identified and migrated.**
5. How many departments/function sites are going to be in the Intranet? **Ten. Refer to the Current User and User Group list in the attachment.**
6. Are Project sites moving to SharePoint Online or Project Online or Project for the Web? **The existing SharePoint Project-related sites aren't "Project" sites. They are SharePoint online sites that will need to integrate with the full SharePoint build when complete.**

### 01 – RFP INFORMSTION: 050 RFP Evaluation Criteria: Phase Three Evaluation, pg. 11

1. The RFP states "The SRC will require the Bidder's assigned key personnel to conduct the oral presentation." Is this oral presentation required to be onsite or has MWRDRF determined virtual? **The presentations, if any, will be virtual.**



2. Can you please clarify key personnel, is this the people executing the project? **Key personnel are any staff that manage or execute the project.**
3. Can key personnel be changed from RFP submission to execution? **Yes, with notification.**

**03 – BIDDER QUALIFICATIONS: 010 Company Information, pg. 16**

1. Should the bidders have veterans on board/be an equal opportunity employer in US? **The requirement is for vendors to submit the completed diversity table found in the RFP detailing proposed project staffing.**

**04 – METHODOLOGY AND PROJECT SCOPE, pg. 18**

1. Is there any existing inventory of content that are to be migrated to Microsoft 365? **No. Creating an inventory will be part of the project.**

**04 – METHODOLOGY AND PROJECT SCOPE: 020 General Scope, pg. 19**

1. What type of functionality/performance will be needed for the interactive calendar, and will the calendar be public or private (who will use it?) (See #1)? **The calendar will be used internally by the staff and Board. Regarding functionality, we would like to leverage any functionality available with minimal customization.**
2. What type of Issue Tracker is currently used (See #5)? **None.**
3. Can a list of file retention rules be provided? **At present, the Fund retains all files. Profiling files for migration, archive, or destruction, will be part of the project.**

**04 – METHODOLOGY AND PROJECT SCOPE: Detailed Scope: 030 – General Requirements: 001, pg. 19-20**

1. What is the directory structure, what are the file breakdown, are they archived files that can moved to cloud based cold storage or are they active files? What is the IT File structure breakdown (older files vs active files, Type of data stored in folder)? Do any of the folders have more than 5,000 items (we want to make sure we are not nearing limits of SharePoint)? **The archiving and cold storage retention will be a part of the migration. There are folders of more than 5,000 files that should be identified and evaluated for archiving.**
2. What is the size, number of files, folder count for the 7 Board of Trustee “One Drives”? **TBD. The drives are currently unused. We intend to support that functionality with this project. The default size defined by MS should be sufficient.**
3. Please provide quantity and type of database backups and large files. **We do not intend to use SharePoint for database hosting, storage, or backup. Our line of business and other database applications are hosted and backed up elsewhere. The existing “old” back up files should be processed for archiving or destruction.**
4. How much data (total size) and how many personal drives need to be migrated to OneDrive? **The information regarding the eleven (11) active users is included in the attachments. The inactive user personal drives will be processed for archiving or destruction.**
5. What type of Microsoft licenses/plans and other licenses that would pertain to SharePoint? **Currently 12xG3 O365 for staff and 10xF3 O365 for the BOT. We are looking into upgrading our Azure tenant licensing to M365 as a part of a different project.**
6. Will the naming scheme for files be determined by the provider, in collaboration with the client or by the client? Will this be defined pre or post migration of files? **Naming schemes will be developed by the vendor with client collaboration pre-migration.**
7. Is there an onsite Domain Controller? **Currently there is one. We are in the process of moving to Azure AD as a part of a different project.**



8. Can you share the SharePoint Prototype attachments? **If you have not received the attachments as a part of the RFP, contact Wendy Sanchez of Provaliant at wsanchez@provaliant.com for a copy.**
9. Does the issue tracker and work progress exist today and need to be migrated or is this new? **They do not exist.**
10. Do you have any custom integrations you want to incorporate into the new system? Can you explain if yes? **No**
11. Any customizations need to come over or are desired in the destination? Can you explain if yes? **If we understand the question correctly, the answer is "no." We don't have any customizations in our current Sharepoint sites.**
12. Can you define archive process, noting the type of archive system? **We expect the provider to propose a solution/methodology.**
13. What are the backup requirements with duration to retain and any recovery point objective (RPO) or Recovery Time Objective (RTO)? **RTO < 24 hours (immediate up to 24 hours), RPO TBD based on cost and methodology.**
14. What workflows including processes are required. Please identify each in detail including any visual diagrams that represent the process. **We would like to leverage SharePoint base functionality for creating user-defined workflows. Staff will need training on creating those workflows.**

#### **030 Detailed Scope; 001 – General Requirements p.20**

1. How many admins would be included in admin training? **Two. One is primary, and the other is backup.**
2. How many end users would be included in training? **Eleven. The vendor is also being asked to provide written training materials**
3. How many end-users are required for training? **Eleven. The vendor is also being asked to provide written training materials**
4. Does the training require to be onsite? **No, training can be virtual.**
5. Can the training be also providing by a training platform along with virtual training sessions? **Yes, training can be provided through virtual training.**
6. What licenses for Office 365 does the fund have for their users? **Currently 12xG3 O365 for staff and 10xF3 O365 for the BOT. We are looking into upgrading our Azure tenant licensing to M365 as a part of a different project.**

#### **04 – METHODOLOGY AND PROJECT SCOPE: Detailed Scope: 030 – Security: 002, pg. 20**

1. Is there an attached security file as indicated in this section or just this "002 Security Requirement" section (We did not see an attachment on this)? **The security policies will be provided to all firms that submitted questions. All others can request the policies from Wendy Sanchez of Provaliant at wsanchez@provaliant.com**
2. How many users and organizational/security groups does Active Directory currently have? **18 users with a possibility to expand. 8 organizational/security groups for staff and 1 for BOT with a possibility to expand.**
3. Is the bidder expected to provide the following IT Services?
  - a. User set-up of multifactor authentication for SharePoint Intranet? **No**
  - b. Office 365 set up of user time-out due to not logging in. **No**
  - c. Disaster Recover management solution set-up and testing? **No**
  - d. Support tools to protect against SharePoint zero-day exploits and other vulnerabilities. **No**



- e. Providing the team with ongoing updates on SharePoint post project? **The client is assuming that Microsoft released updates will be applied automatically. In the event that the update disrupts the functionality of the intranet, the Fund will need support.**

**04 – METHODOLOGY AND PROJECT SCOPE: 050 Bidder’s Project Team: 001 – Project Team, pg. 22**

1. It is mentioned that the bidder may use limited offshore, what % of offshore resources can be utilized for this project execution? **In your response, provide the percentage of offshore resources that you intend to use.**

**BIDDER GENERAL QUESTIONS:**

1. How are users authenticating to the site? Using Azure AD? **Yes (will be once AD moved to Azure)**
2. How many users are licensed/to take part in trainings? **See the answer above (030 Detailed Scope; 001 – General Requirements p.20)**
3. Is there an existing Information Architecture that MWRDRF can share with us? **See sites listing above. We are open to suggestions on better organization to optimize ease of use and access.**
4. How do remote users operate with the current site/Microsoft 365 setup? **Remote users access via web browser with MFA.**
5. Technically, is MWRDRF owning US Government license plan for Microsoft 365? **Yes. GCC G3/F3. Will be upgrading to M365 P1 in the near future.**
6. How many bidders are participating in this RFP? **We have extended the opportunity to bid to all qualified vendors. We will not know the number of respondents until July 27,2022, the response due date.**
7. Do you have a budget allocated for this project? If yes, could you let us know the details? **We have not set a budgeted amount for the project. However, price will be a deciding factor in vendor selection.**
8. Can the bidder utilize Partners/Subcontractors for the successful execution of this project? **Yes, bidders may utilize partners/subcontractors with the client’s approval. The Fund will require that the vendor’s contract includes provisions that they represent and warrant that it has signed or will enter into written agreements with these approved subcontractors at the time of entering into an agreement or prior to their performance of the agreed services. The subcontractor and its personnel shall be considered vendor personnel under the agreement and vendor shall be fully responsible for the management, compensation, and performance of its subcontractors. The vendor shall ensure that the contract between vendor and an approved subcontractor is in writing and requires the subcontractor to comply with any agreement entered into between the vendor and client.**
9. Did MWRDRF engage any of your existing vendor to prepare the RFP? If yes, is that vendor part of this bidding process? **The Fund’s consultant, Provaliant, is assisting the Fund in the RFP and procurement process. They are not bidding on the project.**
10. Do you have a target end date for the completion of this project? **Our goal is to have the work completed within 90 days of project initiation.**
11. What is are your source and destination versions of SharePoint? **We are migrating from a terrestrial storage method to SharePoint online.**
  - a. Source environments (SharePoint on prem, online, file server, Box, Google, etc.) **Physical storage**
  - b. Target environment (SharePoint online) **Yes**



12. Do you have licensing for a migration tool (e.g., ShareGate, BitTitan) **No. We expect the contractor to recommend and procure a migration tool for this project.**
13. How many SharePoint sites do you have? **See q. 3 in 01 – RFP INFORMATION: 010 Purpose of this RFP 001 – Purpose Overview, pg. 4**
14. How much data total is in those sites? **See the answers to questions in the section 01 – RFP INFORMATION: 010 Purpose of this RFP 001 – Purpose Overview, pg. 4**
15. Is this a lift and shift migration or do you plan to restructure information in the process? **We intend to restructure information before migration.**
16. Does this include a OneDrive migration? **Yes. However, currently we don't use OneDrive extensively, but will be migrating user specific work folders to the respective OneDrives.**
17. What is the total storage of these sites? **See the answers to questions in the section above, 01 – RFP INFORMATION: 010 Purpose of this RFP 001 – Purpose Overview, pg. 4**
18. How many users are accessing all this SharePoint content? **Staff, BOT, select vendors (20+)**
19. Is there an O365 presence already in place? (e.g., are you currently using Exchange Online, Teams etc. today) **Yes**
20. Are permissions currently being managed through SharePoint groups, AD groups, or a combination? **AD groups on-prem.**
21. Is there an Azure AD Connect/DirSync in place today? **No**
22. Do your sites have any of the following:
  - Extranet, external facing sites **Yes (project communication site with a 3rd party vendor)**
  - Custom webparts **No**
  - Content editor web parts **No**
  - 3rd party webparts **No**
  - 3rd party workflows **No**
  - 3rd party forms **No**
  - Custom branding or themes, beyond what is available out of the box **See the prototype attachment.**
  - Custom content types. If so, are they managed in a content type library? **No**
  - Multi-lingual **No**
  - SharePoint Designer workflows **No**
  - InfoPath forms **No**
  - Nintex **No**
  - Term store / managed metadata being used currently **No**
  - Content Type hub **No**
  - Custom Content types. **No**
  - Integration with external systems/applications **No**
  - Sensitivity Labels **No**