

Addendum No. 1
SharePoint Design and Implementation

To: Request for Proposals Recipients
From: Santa Clara Valley Open Space Authority
Date: February 7, 2025
Re: Addendum 1 to RFP 2025-01

Addenda No. 1 consists of:

Santa Clara Valley Open Space Authority has received the following questions in response to its Request for Proposals (RFP) for SharePoint design and implementation services.

Additionally, the Authority has revised the proposed fee structure and amended some key dates. **The amended due date is now Friday, February 14, 2025.** Please refer to Exhibit A of this document for more information.

General Questions

1. **“Vendors are to provide all work effort and assumptions used to calculate the fixed fee for each deliverable and milestone” With reference to the statement above, As the complete scope of work will only be known after the completion of Discovery phase, Can we provide only the rate card at this time?**
The fee structure has changed. Please refer to Exhibit A for more information.
2. **Can you clarify what the contract type for this RFP, i.e., cost-plus, time & Materials, firm-fixed, etc.?**
The fee structure has changed. Please refer to Exhibit A for more information.
3. **Regarding the requirement for “fixed fee” or milestone-based pricing:**
 - a. **Fixed Price projects typically include a risk premium whereas, Time and Materials contracts with a Not-to-Exceed cap do not and are therefore less expensive; to confirm, are you requesting a Fixed Price for the whole project?**
The fee structure has changed. Please refer to Exhibit A for more information.
 - b. **Would a Time and Materials contract with a Not-to-Exceed cap and a Fixed Labor Rate satisfy this requirement?**
The fee structure has changed. Please refer to Exhibit A for more information.
4. **After providing the responses to the Vendor questions, we request the Authority to extend the Bid submission deadline by at least 2 weeks, so that we get enough time after receiving Q&A responses which would give us enough time to submit the best proposal.**
Some key dates have been revised. Please see Exhibit A for more information.

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- 5. With reference to the statement 'Please provide description of support services and respective pricing separate from project milestones.'. Do you expect the support services description in the proposed fee schedule section or in any other sections.**
Description of support services may be included in the "Description of Proposed Services" section.
- 6. Are there any industry-specific compliance standards (e.g., HIPAA, GDPR) or internal governance policies that need to be addressed during migration?**
Please refer to the agency's published [Records Retention Schedule](#) to address folders and files subject to archival and/or retention.
- 7. Is there an existing compliance framework already in place?**
No.
- 8. Regarding the requirement stated as "policy(ies) for document management" and/or requirements related to compliance, document retention, and/or records management:**
- a. Approximately how many record categories/series/types comprise the Authority's Retention Schedule that needs to be implemented as part of this solicitation (as applicable)?**
Please refer to the agency's published [Records Retention Schedule](#).
- b. Can you please provide a copy of your records Retention Schedule?**
Please refer to the agency's published [Records Retention Schedule](#).
- 9. How many users currently and expected?**
65 – 70 internal users, 100+ external users
- 10. Will the agency accept Green Card and H1B Visa holder's resumes for this proposal?**
The Authority will accept proposals from firms hiring staff authorized to work in the United States.
- 11. Can the agency provide information about the total budget allocated for this project?**
The agency intends to propose a budget of \$130,000 for Fiscal Year 2025-2026. The budget is not yet approved by the Board of Directors and subject to change.
- 12. Can the agency specify the number of FTEs they require for this project?**
There is no required number of FTEs assigned to this project. Project will be billable by milestones.
- 13. Could you please clarify whether the working hours will be determined according to California time or the time zone of the contractor?**
Per RFP submission requirements, contractor must disclose whether they can be available to the agency according to our time zone (PST).
- 14. Will the contractor be required to only work on Authority issued equipment, such as laptops, storage devices, etc.?**
No.

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- 15. Are there other vendors working within the Authority that the contractor will have to coordinate with to execute the objectives outlined in the RFP?**
No.
- 16. Does the Open Space Authority have an expected timeline for the performance of the work spelled out in Solicitation RFP-2025-01?**
Yes, the project timeline spans about 6 -10 months.
- 17. Are there any pain points or lessons learned from past projects of this nature that this engagement aims to address and/or avoid?**
No, this project will be the first of its kind here at the Authority.
- 18. Will there be an Authority employee designated as the single point of contact for this engagement?**
Yes – IT Technician would be the point of contact.
- 19. For communication and documentation of the project, does the Authority prefer to store this information in their M365 environment for ongoing collaboration, or shall the vendor provide the project collaboration tool?**
Documentation of the project is preferred to be stored in the Authority’s M365 environment.
- 20. How many FTEs do you expect to have working on this project?**
The IT Technician is the primary project manager for this project.
- 21. "Is there a specific project management tool or methodology that the Authority prefers?**
No.
- 22. How many distinct business departments does Santa Clara Valley Open Space Authority currently have?**
There are 7 departments. However, if we include program areas then the total comes to 13.
- 23. Of the nearly 100 staff members of the Authority, are any of them located outside of the California or continental U.S.?**
No.
- 24. How many users are expected to use the intranet?**
About 60 – 70 internally. Externally, 100+.
- 25. Has a document management system already been implemented, or does it need to be developed?**
It does not exist; it needs to be developed.
- 26. Do you have a target go-live date for the new SharePoint environment?**
Preferably by January 2026.
- 27. Who will be the primary point of contact from your team during the project?**
IT Technician will be the primary point of contact.

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28. Are there any budget constraints that might impact the scope of the project?

The agency intends to propose a budget of \$130,000 for Fiscal Year 2025-2026. The budget is not yet approved by the Board of Directors and subject to change.

29. What, if any, specific Microsoft qualifications/credentials are required for bidders to be eligible to participate in this solicitation (e.g., we have 10+ Microsoft Certifications for Modern Work, Cloud Solutions, etc.)?

No specific credentials required; however, vendor experience is a component of the evaluation criteria.

30. On a scale from 1 to 5 where 1 represents a vendor in Northern California and 5 represents a vendor in another state, what is your preference for vendor proximity for this project? In other words, please rate your preference for local vendors.

Vendor proximity is not an evaluation criterion. However, consultants must disclose whether they can be available during the agency's business hours.

31. Remote project delivery enables us to reduce project duration and cost. Most of the projects we do can be delivered 100% remotely however, some customers require onsite engagement. Considering the potential effect on project duration, resource availability, and cost on a scale from 1 to 5 where 1 represents "100% onsite project delivery" and 5 represents "100% remote project delivery", what are your requirements on this continuum?

While 100% remote project delivery is acceptable, the Authority would like the consultant to acknowledge that some milestones may achieve much more efficient and effective results with some degree of onsite engagement.

32. Can the vendor use a mix of onshore (US-based) and offshore (resources from vendor's offices in another country) to work on this project? Or is the Authority explicitly looking for all work to be delivered by resources only from Continental US for this project? Please confirm.

Mix of onshore and offshore is permitted, but must be disclosed in the proposal.

33. Did any contractor/vendor assist the Authority with the initial Exchange Online or SharePoint implementation and/or with the development of this solicitation or any initial evaluation, estimates, or other analysis related to this procurement? If so:

a. Please provide the names of all contractors and vendors

No contractors helped create the Authority's SharePoint.

b. If applicable, what is the scope of work and deliverables that this contractor/vendor provided specifically related to SharePoint Online?

N/A

c. Are these contractors and/or vendors eligible to bid on this project?

N/A

34. We typically conduct the majority of our solution delivery via virtual meetings using Microsoft Teams because this:

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- **Reduces the cost of the project in terms of both travel time and expenses**
- **Enables us to record the sessions for review by anyone who could not attend and/or for future reference**
- **Enables participants from multiple customer locations to participate independent of their location**
- **Enables us to have the most qualified resource on our team conduct the session, independent of location**

Will this way of conducting project delivery meet your requirements?

Yes, use of remote meetings i.e. Teams is fine.

- 35. Under Page 8 of the RFP, #6. "STATEMENT OF AGREEMENT WITH TERMS OF CONTRACT", our understanding is that it will be acceptable for a vendor to propose potential exceptions to the terms of the Contract and other terms and suggest alternative language for discussions with the Authority. We hope that this will be ok, and that our proposal will not be deemed non-responsive. Please confirm.**

Proposals submitted with suggestions to alternative contract language will not be deemed non-responsive. However, the suggested alternative contract language may affect evaluation.

- 36. Under Page 8 of the RFP, it mentions under #C. "Any deviation from the requirements listed below may result in the response being considered non-responsive, thus eliminating a vendor from further consideration", Can the Authority please confirm which section of the RFP it meant by the word 'below' in this sentence?**

This sentence has a typo. The word "below" was meant to be "above"

- 37. We would request the Authority to provide the weightage/points for each Selection Criteria mentioned on Page 9 of the RFP as this will help the vendors to understand how the Authority will score each Selection Criteria, and the Authority can also evaluate according to the scoring criteria.**

Authority staff will be conducting a comprehensive review of each proposal, taking into consideration each element of the selection criteria in equal weight and providing the Board of Directors a recommendation for the most responsible bidder.

- 38. We would request the Authority to share the Pricing format on which we can put the Costing so that the Authority can compare each vendor equally.**

The Authority will be reviewing the overall total cost of the project. Defining milestone deliverables will be proposed by the consultant but will bear no impact to evaluation; cost per milestone deliverable is a proposed payment schedule.

- 39. Do we need to put travel and expenses allowances, if any as a separate line item in the Proposed Fee Scheduled?**

Per the RFP, if there are any travel and expenses allowances proposed, please provide this information.

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- 40. How many hours of post-deployment support the Authority is looking at, and for how many months it should be provided?**

This is unknown at this time. Please provide hourly rate.

- 41. What is the support window expected during the engagement? Will it be 24*7 support or Business Hour Support (9 am-6 pm PST and 5 days Mon-Fri)?**

8*5 support will suffice.

- 42. Do you have an incumbent vendor? If yes, would the incumbent be given preference for award of contract?**

No incumbent vendor.

- 43. Is there a preference for work location? Onsite, hybrid or remote?**

No preference.

- 44. Can offshore (India) based resources work on the project?**

Offshore resources are permitted but must be disclosed in the proposal.

- 45. How much of the work can be done remotely from India?**

Offshore resources are permitted but must be disclosed in the proposal. Consultant must be available to agency staff during the agency's business hours.

- 46. Who are the key stakeholders we will be engaging with during this project?**

IT Technician, department managers, and program managers.

- 47. Can the work for this engagement be performed remotely by US-based resources?**

While remote project delivery is acceptable, the Authority would like the consultant to acknowledge that some milestones may achieve much more efficient and effective results with some degree of onsite engagement.

- 48. In the RFP, "Phase 2 of the project is the implementation of SharePoint online for Intranet and collaboration." We recommend that an "intranet" is intended for information where all employees have view access. The RFP seems to be focused on migrating Collaboration content. Will the Consultant be tasked with building the intranet, or will the Authority team be handling that?**

The scope of work includes services for designing and configuring SharePoint sites that will be accessible to all employees, as well as for collaboration with internal colleagues and external partners.

- 49. "Surveys" of user experience - We would recommend meeting with user groups as part of the Discovery and Analysis phase to gather their feedback and requirements. Can you describe in more detail what is expected from these surveys?**

Surveys may include understanding current pain points of existing sites and file server, what program managers want stored and shown on the sites, what level of collaboration versus view access, the volume of shared files with external partners, the desire for some workflow automation, etc.

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50. Will the Authority provide a standard Cost Breakdown template for Vendors to submit their pricing.

No.

51. Is there a page limit to provide overall proposal response?

No.

52. Can we use Offshore resources to deliver the project?

Offshore resources are permitted but must be disclosed in the proposal.

53. In case all the proposed vendor staff are required to be local to Santa Clara, will it be REMOTE, ONSITE or HYBRID work mode?

There is no preference. While remote project delivery is acceptable, the Authority would like the consultant to acknowledge that some milestones may achieve much more efficient and effective results with some degree of onsite engagement.

54. One of the evaluation factors is "experience and qualifications of personnel employed by the vendor." Do you need a sample resume for the proposed resources. If yes which section, does it need to be incorporated.

Resumes of the proposed team may be included in the "Description of Experience" section.

55. Is Public Sector Experience Mandatory or Optional for Vendor?

Optional.

56. Is Public Sector Experience Mandatory or Optional for Vendor proposed Staff?

Optional.

57. Should we allocate additional resources for post-deployment support?

Allocation of additional resources for post-deployment support is the consultant's decision.

SharePoint Questions

58. Is there another expected use of this site other file storage and sharing?

While its primary use is to streamline collaboration and improve staff's workflow, the Authority also hopes SharePoint acts as a central landing page to frequently visited sites, folders, or files.

59. Will all sites be accessible to external agencies, or will there be two version of SharePoint Online-one intranet and one for external collaboration?

Each SharePoint will have their own levels of access permissions. They can either be accessible to external agencies, internal use only, or both.

60. How many sites are expected to be designed?

We anticipate it may be around eight (8) department sites or twelve (12) program area sites, depending on design consultation

61. What is the expected use case for the internal helpdesk?

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SPO has a helpdesk that can be created to facilitate SharePoint tickets such as site issues and requests. The IT personnel at the OSA will manage it.

- 62. What is the current security/permission setup (wide open, limited, complex, etc)?**
It is complex.
- 63. How many SharePoint administrators do you currently have?**
Currently one
- 64. How many SharePoint administrators do you expect to need training as part of this project?**
Two
- 65. When you say Workflow Improvements, should we expect that to mean overall company process improvements for efficiency or actual system workflows such as automated approval workflows?**
Workflow refers to both company process for efficiency which includes automation. For example a better structured SharePoint with efficient access levels that may be automated will help boost employee productivity.
- 66. Are there any specific business processes that you are interested in automating or streamlining through the use of PowerApps or SharePoint workflows?**
Automation of business processes may be discussed during discovery and analysis phase.
- 67. What are your key requirements and desired functionalities for the new helpdesk system? Are there specific approval workflows required for helpdesk requests?**
Our internal staff can expect to submit tickets in SharePoint to request SharePoint features, issues, access level requests for external partners, etc. The tickets will route to IT staff.
- 68. Please confirm there are no workflows/automated process that would need to be created in SPO using PowerAutomate.**
We will have to assess the current discovery phase to determine whether automated processes are needed.
- 69. What is the estimated number of active sites in the Authority's SPO environment?**
About 10+ sites. We wish to add more sites with this project.
- 70. Do external agencies currently have access to the Authority's SPO environment? If not, how do you currently share files and information with external agencies?**
Yes, external agencies and partners have access to some of the Authority's SPO environment such as folders and files.
- 71. How many people are currently providing IT helpdesk support to Open Space Authority for which the SharePoint training will be provided?**
One person.
- 72. Are there any custom applications that need to be integrated with SharePoint Online?**

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Yes, ArcGIS Online.

73. Does the existing SharePoint site collection contain classic content that needs to be migrated to the modern experience?

Yes, custom SharePoint groups and permissions.

74. How many SharePoint site collections currently exist?

10+ active sites.

75. Does a company landing or home page currently exist, or will it need to be designed from scratch?

It does not exist. It will need to be designed from scratch.

76. Is there an existing style guide for the organization's branding and design?

Yes and will be provided during discovery.

77. Have mockups for the root site and departmental site home pages been designed, or will the vendor be responsible for designing them?

No mockups have been created and vendor will be responsible for providing design concepts for final agency approval.

78. What components are required to be included on the home page?

At minimum, a list of all department SharePoint sites and buttons to access them, SharePoint ticket submission area, and agency news area.

79. Will custom web parts be used, or will only out-of-the-box SharePoint web parts be allowed?

Preferably out of the box Sharepoint web parts allowed.

80. How many departmental site templates are required?

Site templates should address having a common universal structure and look for each site. So preferably 1 – 3.

81. Are there any workflows that need to be developed?

The SharePoint ticket system should have workflows developed. For SharePoint sites, we will rely on the vendor's expertise and suggestions.

82. What are the expected complexity levels of the workflows (e.g., simple, medium complexity, highly complex)?

We are unsure as of yet. We will rely on the vendor's expertise and suggestions.

83. Are there any forms that need to be developed?

Not that we are aware of. However, use of forms may come up as a solution during discovery and the agency is open to using forms.

84. What are the expected complexity levels of the forms (e.g., simple, medium complexity, highly complex)?

If forms are to be created, they would be simple to medium complexity.

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85. On a scale from 1 to 5 where 1 represents “None” and 5 represents “Expert”, can you please indicate what SharePoint Online-related skills you currently have in house in terms of:

a. Infrastructure, Administration and Maintenance

3

b. Information Architecture Design and Implementation (e.g., Content Types)

2

c. Content Owner/Authorship

3

d. PowerShell, CSS, and JavaScript Development

2

86. Regarding requirements related to implementing the “Information Architecture”: a. On a scale from 1 to 5 where 1 represents “No Taxonomy in SharePoint” and 5 represents “A comprehensive Taxonomy in SharePoint to fully support the solution in areas such as search, workflow, and document and records management, etc.”, how would you rank your current Taxonomy comprised of Content Types, Term Sets, Site Columns, etc.?

Current taxonomy would lean towards 1 with little to no taxonomy.

87. Regarding the requirement stated as “workflow improvements”:

a. Is the development of specific workflows within the scope of this solicitation and if so, approximately how many workflows are to be built?

Development of specific workflows are not within the scope of this RFP. However, during the discovery and analysis phase, consultant can expect to provide recommendations for process improvements that can be executed within the SharePoint environment based on feedback received from key stakeholders.

b. Are the required workflows centered on document approval or do they include process workflows to automate line of business functions? If they include process workflows, please provide sufficient details for us to estimate this effort.

The requirement pertains to assessing and analyzing how SharePoint features and functionalities can be utilized in staff’s everyday tasks and process workflows to improve efficiency.

Development of automated workflows using Power Automate or other Microsoft services is not within the scope of this RFP. Rather, staff is seeking the consultant’s expertise with SharePoint to help us analyze our current environment and provide a recommendation on improvements to the design and configuration to maximize staff workflows.

However, as part of security configurations and training/documentation, consultant may be required to develop some automated workflows, if not already available out of the box, to provide reports and support the IT Technician with daily administration of the sites.

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- c. If available, can you please provide an outline of the steps or flow diagrams that represent a typical workflow?**

An example of a typical workflow is the collection of SharePoint data such as user activity that gets consolidated into a report and gets sent out as an email to IT staff on a monthly basis.

- 88. Regarding the requirement stated as “Create an internal helpdesk system or have an ability to integrate SharePoint with an out-of-the- box helpdesk solution”:**

- a. Do you currently have a help desk solution and if so, who is the manufacturer and what is the product name?**

No, the Authority does not have a help desk solution.

- b. Can you please detail how the help desk solution will be used?**

The help desk system will allow internal staff to create tickets for SharePoint related issues, bugs, and requests. The IT staff will manage the help desk.

- 89. What are the primary pain points with your current SharePoint and file server setup?**

- The lack of folder and file organization and structure
- Access level permissions and group membership not created for both internal staff and external partners.
- Non-uniformity among sites.

- 90. Can you provide details about your current SharePoint Online structure?**

Sites were created loosely between departments and program areas. Sites may be associated with M365 Groups, Teams, or both.

- 91. Do you have an existing governance model for SharePoint usage?**

No.

- 92. How is file and folder access controlled today?**

Some are controlled by custom SharePoint groups and permissions. For the on-premise file server, it is controlled by the Active Directory.

- 93. How do you currently manage user permissions and access control in SharePoint?**

Through membership and, for some sites, custom SharePoint groups and permissions.

- 94. Do you have external collaborators who need access to SharePoint?**

Yes.

- 95. Are there any security incidents or concerns that need to be addressed with the new implementation?**

Yes, we want to prevent the accidental sharing of folder and files by staff to external entities. This may be done through folder inheritance or unknowingly. There should be safeguards put in place to prevent this.

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96. Would you like an intranet-style home page, and if so, what features should be included (e.g., news, announcements, links)?

Yes, the home page should include list of all SharePoint sites and a button to access them. An area for a newsfeed and frequently used links.

97. Should SharePoint integrate with any existing third-party applications (e.g., ServiceNow, Jira, Salesforce)?

Yes, ArcGIS.

98. If a new helpdesk is needed, what key features are required (e.g., ticketing, escalation, reporting)?

A key feature would be ticketing. Report features would be valuable.

99. How should permissions be structured (department-based, role-based, or individual-based)?

Permissions should be department based for internal staff. For external users, they will need more fine tuning so it may be role based.

100. Should there be restrictions on file downloads and external sharing?

Yes, for some folders and files we wish to not allow users to download or share.

101. What level of audit logging and alerting is needed?

Audit logs may include whenever a user gets granted access to a folder or file and who granted them that access, downloading or sharing a file, deleting a folder or file.

102. What are the file types on current Share Point sites?

Files vary greatly between Office documents, PDF, CAD files, ArcGIS map and data files, video, and photos. Consultant may obtain a more comprehensive assessment during discovery.

103. On Page 3 of the RFP in the Current Environment section, there is mention of external agencies. Please elaborate these external agencies and their system types that needs to be integrated.

External agencies refer to partners that need access to the Authority's SharePoint folders and files. No integration with their systems or app needed.

104. Do you have a change management strategy for adopting the new SharePoint system?

No, the Authority will work with the vendor and departments to develop one.

105. What kind of Document "search experience" expected on the proposed SHAREPOINT libraries?

Users should be able to search for folders and files easily, find shared folders and files, be mobile friendly, and have a friendly user interface.

106. Has the Authority engaged a Design/Marketing firm for SharePoint Site Layout or Department Sites?

No.

107. Will the Authority provide Wireframes or Blueprints for SharePoint Site Layouts?

Consultant is expected to propose layout designs for Authority approval.

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- 108. Does the Authority have documented enterprise level security policies and procedures applicable to IT Systems in particular portals and intranet sites?**
No.

Microsoft 365 Questions

- 109. How many separate groups should be accounted for during discovery session planning?**
There are about 14 M365 Groups to be accounted for.
- 110. How many existing Teams sites (the ones accidentally created and somewhat used) will continue to be used after this migration? Will the current sites in use need to be redesigned?**
There are about six (6) Teams sites already created and currently in use. Current sites may or may not be used or redesigned based on design consultation.
- 111. Are there any security compliance requirements that we should be aware of?**
No, but configurations should follow best cybersecurity practices
- 112. Does the Authority currently have PowerApps, PowerBI, and/or Power Automate licenses in its environment? If so, are end users currently able to create tools with these platforms on their own?**
Yes, we have Power Automate available and about two users are able to create and use automations.
- 113. Is the Authority's M365 environment GCC, GCC High, or commercial?**
Commercial.
- 114. Is there an incumbent contractor who currently manages the Authority's Microsoft 365 environment? If so, can you please share the name of the vendor?**
No vendor manages the Authority's M365 environment.
- 115. What type of Microsoft 365 subscription is currently in use within the organization?**
Office 365 E3 licenses.
- 116. Is Azure Active Directory (Azure AD) currently in use? If so, is it synchronized with the on-premises Active Directory, or will the vendor be responsible for synchronization?**
Yes Azure AD is in use. The Microsoft tenant is already synchronized with our Azure AD.
- 117. Have all users been assigned the necessary licenses?**
Yes.
- 118. Are external agency users included as part of the Azure Active Directory?**
No. They will not need to be, they are simply guest users in the tenant.
- 119. Is Power Platform currently in use?**

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Yes, but not for SharePoint use.

120. Is the Power Platform currently in use within the organization?

Yes, but not for SharePoint use.

121. What types of Power Apps and Power Automate licenses are available?

Free and premium.

122. How many Power Platform environments are currently configured?

Zero.

123. What Microsoft tools are currently in use, such as Microsoft Teams, Microsoft Planner, Power BI, and OneDrive?

The following apps are in use: Teams, Planner, Power BI, and OneDrive.

124. Is Exchange Online being used for email services?

Yes.

125. Do Authority staff have different Microsoft 365 licensing? Please outline your Microsoft 365 licensing.

All staff have the O365 E3 licenses.

Data Migration Question

126. What is the size of the data to be migrated from the file server?

Up to 3 TB

127. Is the current file structure expected to remain during the migration or would mapping to a new structure be required?

A new structure may be required to best help organize folders and files since the existing file structure is quite siloed and inconsistent.

128. For the data not being moved, will there be a cleanup effort (assistance with archiving) when creating data management policies?

Yes, there will be a cleanup effort. Assistance from vendor will be needed to assist with archiving and creating data management policies.

129. For Phase 2 of the Authority's SharePoint implementation, you state it will encompass a "partial migration of on-premises files to the cloud". Does the Authority wish to maintain a hybrid SPO/On-Premises files storage solution or will these files eventually be migrated during a later phase?

No the remaining on-premise files on the File Server will remain on-premises only. If staff wish to migrate more files at a later point, they will need the tools to do so.

130. Does the Authority want the contractor to provide recommendations for a migration tool or does it already have a migration tool in place?

The Authority would like to receive recommendations for a migration tool.

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- 131. The Authority currently utilizes an on-premise file server. The file server property of the Authority or is it hosted by a third-party?**
The file server is the Authority's property.
- 132. What is the approximate total storage volume of content currently residing on file servers and any existing SharePoint environments?**
About 6 TB total
- 133. How are user groups and permissions currently managed on your file server? Are these synchronized with SharePoint or Azure Active Directory?**
They are managed by Active Directory solely. They are not synchronized with SharePoint.
- 134. Are there any files in current system that are interlinked or reference other files, such as documents with embedded links or references shared between departments?**
Yes
- 135. Are there any migration tools currently available for use?**
No, there are not.
- 136. Has the organization already purchased any migration tools, or would it be open to using third-party tools such as ShareGate?**
No migration tools have been purchased. We are open to third party software tools.
- 137. What is the name of the file server from which the data needs to be migrated?**
It is an enterprise-level server. More information regarding its configuration can be shared during the discovery phase.
- 138. Do we need to reorganize the folder structure during migration, or can we migrate it as is?**
Folder structure may need to be reorganized.
- 139. Are there any specific sites or files that should be prioritized during the migration?**
Not that we desire or aware of at this time. However, it may be possible specific sites or files come up as priority during discovery.
- 140. Are there permissions set at the folder or document level on the on-premises sites or file server?**
Yes, folders and files on the file server have certain permission levels.
- 141. Are there any sensitive files that require special security considerations?**
Yes.
- 142. Can we use a third-party licensed tool, such as Sharegate, for data migration? If so, should the license cost be billed separately or included in the overall estimation?**
Included.

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- 143. What are the business drivers for the migration? What is the potential business impact of the migration?**
The business driver is to move collaboration and sharing to the cloud. The potential business impact is to our staff downtime that needs access to the folder and files.
- 144. Are there specific types of files that require special handling (e.g., large CAD files, sensitive documents)?**
Yes, CAD and ArcGIS files.
- 145. What migration tools, if any, have you considered or used before?**
N/A
- 146. Do you have structured metadata or tagging requirements for files?**
No.
- 147. Are there specific file types that should not be migrated?**
That will be determined by each department or program area.
- 148. Should historical versions of files be retained during migration?**
Yes.
- 149. Will users require self-service migration tools, or should all files be migrated centrally?**
Files that are to be migrated can be migrated centrally. Staff that wish to migrate more after the initial migration should use the self-service migration tool.
- 150. How many servers and databases (aside from Desktops and Laptops) need to be migrated to M365/Azure Cloud for Phase 1 of the Project?**
One file server needs their data migrated to SharePoint cloud.
- 151. Since Individual employees are holding the documents on their One Drives, if we provide the designated library on Sharepoint, will the users be copying the data or the Vendor is expected to carry out this activity?**
The users can simply copy their data over themselves for OneDrive. However if the vendor can suggest a more efficient method or tool then it will be considered.

Training & Documentation Questions

- 152. What is the technical expertise level of your staff in using SharePoint?**
Their technical expertise is low with SharePoint.
- 153. Do you prefer live training sessions, recorded sessions, or self-service documentation?**
No preference. A combination of all is acceptable.
- 154. Should training be role-specific (e.g., end-users vs. IT staff)?**
There should be two separate trainings, one for end user staff and the other for IT staff.

Addendum No. 1
SharePoint Design and Implementation

- 155. What documentation formats do you prefer (PDF guides, knowledge base, videos)?**
Documentation should be in PDF and may be accompanied by a video.

Addendum No. 1
SharePoint Design and Implementation

Exhibit A

On page 6 of the RFP, under the “Submission, Review & Special Conditions” section –

Required information item #1 is replaced in its entirety with:

1. Pricing for the discovery and analysis phase must be submitted as a fixed amount. For the remaining configuration, implementation, migration, and training phases, pricing shall be provided on a time and material basis with a not-to-exceed amount. Vendors are to provide all work effort and assumptions used to calculate the estimated hours for each deliverable and milestone.

On page 6 of the RFP, under the “Submission, Review & Special Conditions” section –

Key Dates table is replaced in its entirety with:

Event	Tentative Date
Request For Proposals Issuance	January 17, 2025
Last Day to Submit Questions	January 31, 2025
Final Addenda Issued	February 7, 2025
Proposals Due	February 21, 2025
Evaluation Period	February 24, 2025 – March 7, 2025
Vendor Interviews	Week of March 10, 2025
Award Bid	April 24, 2025

On page 8 of the RFP, under the “Submission, Review & Special Conditions” section –

Submission of Responses item #3 Proposed Fee Schedule is replaced in its entirety with:

Pricing for the discovery and analysis phase must be submitted at a fixed cost. The consultant must also include a time and material rate for the remaining proposed services and include a breakdown of estimated hours and a not-to-exceed amount (grouped by deliverable). Implementation pricing must be submitted on a deliverable and “milestone” basis. Please identify major milestones as part of the project. It is required that costs be invoiced upon completion of major milestones.

Costs listed as “to-be-determined” will not be scored. Proposers must submit implementation costs as fully loaded rates that include all costs and expenses, except travel.

Please also disclose if your firm will use sub-contractors and/or offshore consultants for the project.

Please provide any travel and expenses allowances, if any.

The Authority is also interested to receive pricing on post-deployment support. Please provide description of support services and respective pricing separate from project milestones.