

REQUEST FOR PROPOSALS #0317A
SHAREPOINT DEVELOPMENT AND IMPLEMENTATION
In support of
ELIZABETH GLASER PEDIATRIC AIDS FOUNDATION (EGPAF)
1140 Connecticut Avenue, NW, Suite 200
Washington, DC 20036

Firm Deadline: (Friday, March 6, 2020) New Deadline

QUESTIONS AND ANSWERS

Question	Answer
What is the current SharePoint EGPAF is using?	EGPAF is not currently using SharePoint for our intranet. We are only using SharePoint sites in Office365.
What is the existing Site type? Is it a SharePoint Online Classic Team site?	EGPAF is not currently using SharePoint for our intranet.
Do you currently use any third-party solutions?	No, we do not use any third-party solutions in relation to SharePoint, however, we use a number of third party application for other systems.
Are you currently sharing content types or other metadata in the site hierarchies in your current site collections?	EGPAF is not currently using SharePoint for our intranet. We are not currently sharing content types or metadata.
What is the state of current information architecture in SharePoint environment? Do you have managed metadata terms set? Has this been discussed and documented?	EGPAF is not currently using SharePoint for our intranet. We do not have a managed metadata terms set. We have discussed the need for an organization-wide metadata taxonomy.
Can you please provide clarification regarding your outcome goals for modern pages and webparts? By “communications,” do you mean the News web part or are you referring to the new communication site template?	We wish to take advantage of all the communication and collaboration tools that are offered with no, or minimum, customization. We will rely on vendor guidance in the best web parts/apps to accomplish this.
Has the Team adopted usage of MS Teams and MS Planner? Will you be interested in a integrated collaborative solution using additional Office 365 apps such as Flow, Power BI, Power Apps etc.	EGPAF is in the process of introducing Office 365 applications across the organization. Currently we are piloting usage with the IT department. However, several units have been using SharePoint/Teams on their own. We are interested in a fully integrated collaborative solution using Office 365 applications.
Do you have any existing templates of sites that you want to reuse?	No.

Would EGPAF prefer and out of the box/vanilla solution/layouts or custom solution? Based on the customization the effort may change. Even though Office 365 ecosystem is evolving constantly there are scenarios where custom work would be necessary.	We would prefer an out of the box solution with EGPAF branding,
What is your requirement for content publishing process? Do you have it in current SharePoint environment?	We would rely on vendor guidance on this.
We generally use custom SPFx and Open source best practices from PnP provisioning? Are there any concerns or restrictions for using this approach.	If by PnP you mean utilizing SharePoint Patterns and Practices PowerShell commands (PnP PowerShell), then we have no concerns. With that said we reserve the rights to restrict any approach if we feel creates potential security or application risks.
Do you have full Azure services available if custom solutions are required?	Yes
What are your mobile/off-line requirements? Do users access content from remote location?	The majority of EGPAF staff are located in Africa. The site should be accessible through mobile devices and in areas with limited broadband.
How many environments will the vendor have to implement?	We are open to discussion here: at least a test and production, however, a UAT would be nice as well.
What are the source(s) of data migration? We see that OneDrive is being used. Is there a central shared drive currently being used? Are the files mostly in .docx and .pdf?	Data will be migrated from our existing intranet site. Files from OneDrive and other shared drives do not need to be migrated. The majority of files are in .doc, .pdf, and other standard Microsoft office application formats.
What are the content required for migration – Sites, Users, Data size, Content Types, Documents etc.? Are you open to adopt a migration tool as needed?	The data types listed are correct. We are open to using migration tools as needed as well.
Do you want the entire 20-30 GB to be migrated? Do you expect the vendor to do an inventory analysis and mark items to be moved? Has any preliminary work for identifying data to for migration done?	We would like the full data to be migrated: It would be helpful if the vendor migrated the data, however, this could be a vendor and EGPAF activity.
Is there any customization at Site, Library(s), lists, Custom pages etc. currently? Customizations like – Branding, custom controls, custom web parts, external plugins or web parts etc. that have to be migrated?	We currently do not use SharePoint in this manner.
Are there any type of existing workflow that have to be migrated?	We currently do not use SharePoint in this manner.
We assume that the existing site and the proposed site in the same tenant?	Yes.

Data bandwidth issues. More optimization needed?	The majority of EGPAF staff are located in Africa. The site should be accessible in areas with limited broadband and cellular service.
Is multi-lingual a requirement?	EGPAF staff in Africa speak French, Continental Portuguese, and Swahili. We would consider a multi-lingual solution based on availability and budget.
What are the requirements for external user access to the system?	External user access to specific sites/data is a requirement.
Does the current system have any tags attached to content to improve search? Does this also need migration?	The current intranet does not utilize tags consistently. Tags should be migrated when present.
What is the size of Office 365 and SharePoint IT team?	Two dedicated staff with support from the KM Working Group and the IT Department.
Please share your budget or budget range for this project?	EGPAF has budgeted for this project, however, we do not traditionally share this.
We will be able to recommend approaches and tools for migration. However, we would expect EGPAF to provide us with the third party tools/apps during for the actual migration process. Please let us know if you have any concern.	We expect the vendor to recommend their preferred approach. The additional tools should be factored into the price of the bid, if they are being planned on from the outset.
What O365 License is applied for 3000+ of the users assigned in O365?	Office 365 E2
Does EGPAF use any monitoring tools to capture metrics in the current SharePoint environment? Based on our experience from previous Office 365/SharePoint engagements we have a set of tools, templates and utilities. We would be able to reuse these to cost of engagement	We do not use any tools to capture metrics other than the metrics provided in Office 365.
Is on-shore/on-site a mandatory requirement? Is an in-person interview with the evaluation committee a requirement? Can the interview be done on Skype? Can the requirement gathering be done on-site and rest of the work offsite?	On-shore/on-site is not a mandatory requirement. Should interviews be required, they may be conducted through Skype, Zoom, etc. Work can be done offsite.
Is it possible to see a demo of your current systems?	Access to the current site will be given to the winner. We would like the new site to be designed from the ground up so seeing this shouldn't affect the design.

Requirement refers to the proposed system integration with IT help desk. Does EGPAF already have an IT help desk system up and running? If yes, any information you can share about the existing system's integration capabilities would be useful to determine technical mechanisms for the integration. Given the sensitivity of data exchange between 2 systems we'd like to ensure we capture as much information about this as is practically possible.	Yes we currently use BMC Track-It.
Please briefly describe the use case for the integration and data that will be exchanged between the SharePoint system and the helpdesk.	A portal to the IT Help Desk software. We currently use BMC Track_It but are evaluating other help desk systems.
Please share some details around the existing intranet i.e. which platform it was developed on, database technology etc.	We currently use Interact's Intranet software. It is based on Windows and SQL.
Please clarify which platform the existing workflows are built on.	There are no workflows in the current intranet
In case of offsite consultant needs to travel onsite (EGPAF Washington DC office or other training location), Will EGPAF reimburse indirect expenses of consultants (travel+ stay at onsite)?	Yes, EGPAF would reimburse those costs associated to M&IE plus travel, however, those trips should be captured in the response.
We would like to clarify if Phase 2 is also to be included within our proposal or is that a phase that will be analyzed during requirements analysis and quoted for separately?	Phase 2 is not to be included within this proposal. The decision to bid out Phase 2 or maintain relationship with the chosen vendor will be at the discretion of EGPAF.
As per given details (approx. 20 GB data need to migrate to proposed system), if possible please share the details type of data (file types such as PDFs, JPG etc.) this data contains? We'd appreciate as much detail you can provide about the existing system and its capabilities for a migration. For e.g. does it have any SDK(Software Development Kit) or API(Application Programming Interface) which we can use to extract the data? There are multiple ways of doing the migration; we'd like to ensure we take the most optimal approach taking into consideration the current system's capabilities and/or limitations.	Types of data are mostly Microsoft office files (docx, xlszx, ppt, etc.), jpeg, png, pdf, mp4.
Is there a preferred Go-live data or period which works best for you to go-live with the new system. Typically, we find that some customers do not want to take on activities during an audit and such.	The target would be Q4 of 2020.
If possible ,please share more details on proposed workflows e.g. 1-2 examples of workflow requirements (will help to predict complexity of workflows) and approximate total number of workflows to be implemented?	Standard document management workflows. Dashboard roll-up workflows. Procurement/Contract progression/approval workflows. HR Onboarding/Offboarding workflows. Workflows to be gathered during discovery/requirements gathering.

I just wanted to clarify the reference requirement. We have completed a very large project with State Center Community Colleges in Fresno California which included 5 SharePoint sites and this is one of our main references. Other projects have not included SharePoint but are of large in scope and complexity. Would that be accepted as the required 3 references, even though they all do not all include SharePoint?	References should be based on SharePoint implementations for like-organizations, or other Intranet solutions implemented for like-organizations.
You are on Office 365, what type of licenses are being used?	Office 365 E2
What other workloads such as Teams, PowerApps, Flow, Forms, etc. are you using?	EGPAF is in the process of introducing Office 365 applications across the organization. Currently we are piloting usage with the IT department. However, several units have been using SharePoint/Teams on their own. We are interested in a fully integrated collaborative solution using Office 365 applications.
Would you like InfoPath Forms and Nintex workflows to be migrated to SharePoint Online?	We do not currently utilize any workflows in our intranet.
What type of files or documents are being used and will be uploaded to SharePoint?	Types of data are mostly Microsoft office files (docx, xlszx, ppt, etc.), jpeg, png, pdf, mp4.
Are there any custom solutions that you know you want to implement?	No.
Is there a need to integrate SharePoint with any external application or database?	EGPAF will rely on vendor guidance on integration during Phase I in regards to workflows.
Do we need to implement custom branding and theme?	Yes. EGPAF will provide all branding and theme information.
For how many functional groups / departments do we need to setup the intranet?	A rough number would be 20 Departments and 16 countries.
Are the departments being shared across different regions or each region needs its own department?	A mix - departments would span each country as well as a country specific. Countries also currently have their own pages on our present intranet.
What type of documentation is required?	All process documentation.
What type of training is required?	Train the trainer and video training.
Do you have any files on network drive? Do those files need to be migrated?	Files on OneDrive or network drives do not need to be migrated. Only files from our current intranet will need to be migrated.
Do you need a custom responsive UI design for the new Intranet solution?	UI should be appropriate to an intranet solution. Minimal customization is preferred.
Is there a separate design requirement for mobile and tablet devices?	Not necessarily a separate design, but would want it to be mobile/tablet friendly

Would you like us to completely redefine branding for the Intranet Solution?	EGPAF will provide all branding and theme information.
Do you have integration with any other application (ERP, CRM, etc.)? If yes, please specify the applications and how are they integrated. Will you be setting up Development, Test/Staging and Production environments with appropriate configuration, or is it assumed to be the vendor's responsibility?	We do not have any ERP/CRP applications that are integrated with our current intranet. It would be the vendor's responsibility to develop a test/staging/production environments.
Is Search currently customized using custom Display Templates?	No
How are you using metadata to improve content searchability?	We are not currently using metadata in search.
If there is a need for customization, is leveraging SPfX custom components approved?	We do not see the need for customization. Should customization be needed we would rely on vendor guidance.
Are there any web services are hosted on the SharePoint farm?	We do not utilize SharePoint in this manner.
Kindly confirm if any 3rd party BI Tools are being used.	PowerBI and BI360
Is there a user profile customization done with 3rd party providers (e.g. People directory, Websphere, Schema logic etc.)?	No.
Is there a NTE budget for this project?	EGPAF has budgeted for this project, however, we do not traditionally share this.
Is there a need for personalized or role-based content?	Yes.
How many vendors does EGPAF expect to submit to this RFP?	EGPAF does not release this information to bidders.
Does EGPAF own or prefer a specific migration tool?	No
How many stakeholders would be involved in discovery sessions about look and feel?	Approximately 25 individuals.
Is onsite required for discovery sessions?	Onsite is not required for discovery sessions. Discovery and requirements gathering can be conducted online through an agreed upon platform. EGPAF currently uses Zoom as its preferred communication method.
Are offshore resources okay to be used on this project?	Yes. Offshore resources are acceptable to be used on this project.
Is EGPAF utilizing workflows for Business processes currently? If so, how? How many and do they need to be migrated? And what types of workflows? SharePoint Designer or 3 rd party?	We are not utilizing any workflows.
What kind of training do you envision?	Train the trainer and video training.
Is onsite training required?	Onsite training is not required. Training can be conducted online through an agreed upon platform. EGPAF currently uses Zoom as its preferred communication method.

Is EGPAF interested in a managed service agreement after the completion of the project?	To be determined.
How are you using meta data to improve content searchability?	We are not currently using metadata in search.
Is there a pre-defined meta data structure that EGPAF has come up with or does this need to be discovered in the planning phase?	There is no pre-defined metadata structure at this time.
Is there going to be rearchitecting/reorganizing involved with the migration of content?	Yes. We are interested in rearchitecting/reorganizing the data structure of the new intranet.
Is there a taxonomy that needs to be implemented or is this a part of the discovery and implementation phase?	There is no pre-existing taxonomy at this time.
Has EGPAF worked with any of these vendors before?	EGPAF does not release this information to bidders.
Is there a specific methodology that EGPAF uses for Content Strategy and Planning?	No. We would rely on the vendor to provide guidance in this area.
What is the current analytics measurement platform? Is the goal to use purely SharePoint analytics or a 3 rd party?	Unknown. We are not familiar with SharePoint analytics and would rely on vendor recommendation.
Regarding training, are you looking either 1:1 and group training only or would you like to see proposals that include production of video-based training approach	Due to our geographical dispersion, we would seek group training (train the trainers scenario) as well as video-based training.
Will the wireframes be needed for design of out of the box capability or will it include custom elements as well?	Unknown. We do not have knowledge to answer this question and rely on vendor guidance.
Will there be a method to update and revise the wireframes if the content plan determines an opportunity for improvement?	Unknown. We do not have knowledge to answer this question and rely on vendor guidance.
Will the content strategy include the governance elements for User Generated content?	Yes.
Is there licensing in place for Power BI, PowerApps, and Power Automate?	Yes - we have Office 365 E2 licensing. It includes PowerApps, Power Automate, and the free version of Power BI. It does not include Power BI Pro.
Is the Vendor expected to operate from DC Area or can they be from Offsite/Offshore?	The vendor will not be required to operate from the DC area. Operating offsite/offshore is acceptable.
Is there any existing documentation on the Interact-Intranet setup that we can use as baseline?	We would like the new site to be designed from the ground up so seeing this shouldn't affect the design.
Can we get the list of pain points from existing Interact software based Intranet solution?	Search; Navigation; Document management, document access, document viewing; Lack of collaboration tools; Lack of workflows;
Are there any existing integrations between the current SharePoint Online setup and Interact-Intranet setup?	No. There are no integrations between the Interact intranet and SharePoint Online.

Will all EGPAF stakeholders be available for initial RA / Discovery meetings?	Yes. We assume all stakeholders will be available to take part in requirements gathering and discovery meetings.
Does EGPAF use any tools / platform for Training?	Yes. EGPAF utilizes a Learning Management System called Net Dimensions through our membership with Humentum.
Would EGPAF expect any proposed third party tools to be white-labelled?	No.
Will EGPAF share any existing templates for documentation? If not, we will follow our standards/templates for all the necessary documentation	Vendor templates will be acceptable for necessary documentation.
Should the portal be multi-lingual? If yes, what are the languages that we need to support?	EGPAF staff in Africa speak French, Continental Portuguese, and Swahili. We would consider a multi-lingual solution based on availability and budget.
Do they have all their users from different locations licensed to use SharePoint (users synchronized in Azure AD)?	Yes
Can we get the list of any existing tools for Backup/DR etc.?	This will be discussed with the winning vendor.
Is there a Single Sign On setup (Users do not provide login credentials to get into the system while they are inside the network)?	Yes. EGPAF operates a Single Sign On setup utilizing Okta.
Is there any MDM solution in place?	Okta
Does EGPAF has any projected timeline/target date for implementation?	Q4 2020.
What license model are the 3100 users using in Office 365 and if needed would EGPAF consider changing that model if necessary, to a higher more inclusive level?	Office 365 E2. We have not budgeted for a higher level at this time and would likely be cost-prohibitive.
Can you verify the amount of data, it is listed at 20-30 GB which seems extraordinarily low given the user count, should that have read TB?	20-30 GB is correct for existing intranet. We expect growth in data with new intranet.
The RFP mentions EGPAF rolling out Office 365 features, does that mean that EGPAF rather than the selected vendor, will be doing so and if so, will that be prior to the start or during the project being run by the selected vendor? We are trying to measure the impact of any overlap of priorities and projects.	"Rolling out" refers to introducing Office 365 to the organization. This is timed to the 2nd/3rd quarter 2020. EGPAF would be amenable to vendors input on utilizing Office 365 applications in conjunction with the development of the Intranet.
The RFP mentions the desire to improve information management with "unstructured" style, can you expand on this as the use of metadata and content types typically implies a "structured" approach?	EGPAF wishes to improve the management of unstructured information utilizing a structured approach (metadata and content types). This was an error in the RFP.

Can you provide a list of examples of external systems that EGPAF expects the system to seamlessly connect with (in order to provide the most appropriate work types in the T/M codes)?	This phase will not include any external systems. Future phases may include external system connection.
Does EGPAF use any third part tools today within Office 365? Tools by vendors such as AvePoint, K2, Nintex, etx (tools for backups, workflows, process management, metric analysis, training and more).	No
Is EGPAF open to including multiple third party tools in a SWOT analysis between EGPAF and the selected vendor warrants their inclusion and does the vendor need to provide any costing prior to being selected?	Yes. EGPAF would be open to include third party tools in a SWOT analysis. Vendor would need to provide costing before selection. Selection would be at the discretion of EGPAF.
It seems that EGPAF wishes to take a very traditional Waterfall methodology to the project. Is this a safe and correct assumption? In other words, all requirements analysis and documentation for the phase(s) would occur, followed by review, approval, correction and then move into implementation, testing and final roll out. This is compared to taking a more Agile approach where written documentation takes more of a back seat to the project requirements and deliverables and the actual deliverable of working elements in a shorter agile fashion.	Since this will be a vendor drive project, we can adjust to any project style either Waterfall or Agile.
Is EGPAF versed on limitations of SharePoint Online? Some of the elements in the RFP seem to imply wants, needs or requirements that fall outside of the scope of what can be done within SharePoint Online? This is important as the relationship between EGPAF and the chosen vendor needs to start off with an understanding of those limitations.	No. We are not versed in the limitations of SharePoint Online. We have very limited knowledge of current SharePoint capabilities and will rely on the vendor to provide guidance in this area.
Will the referenced “test environment” be within EGPAF’s tenant or was EGPAF expecting the vendor to host the test environment prior to it moving into EGPAF’s tenant?	Yes.
You mention a backup strategy which we can work with you as the chosen vendor to select, but what is the EGPAF expectation for the “management for the modules built”?	The winning vendor will receive information on EGPAF's backup strategy.
Will EGPAF create and provide access to the tenant for the vendor to do the work from the vendors own facilities, or is EGPAF expecting that the majority of the work would occur “on site” at one of the facilities as noted in the RFP?	The vendor will not be required to work onsite at EGPAF facilities. EGPAF will also provide vendor with space at the Washington DC HQ office should the vendor choose to work at our facility.

Under the contract stipulations you request that every individual that is likely to work on the project provide EGPAF with two references; is that correct in lieu of corporate level references? Can you better define what each of these additional references should be (personal, professional and not related to vendor, something else more specific)?	We required corporate level references, as well as professional references from main individuals who will be involved in the project.
We assume the intranet is to be developed for English language only, please confirm?	Our current intranet is English, however, EGPAF staff in Africa speak French, Continental Portuguese, and Swahili. We would consider a multi-lingual solution based on availability and budget.
How many departments currently using the intranet?	5 departments and 15 sub-departments (US)
How many intranet sites your current intranet has?	There are 93 content areas (intranet sites)
What is the technology environment of your current intranet?	On-premise. We use Interact Intranet, which is based on Windows and SQL.
What is the size of your current document library?	Approximately 2908 pages
Could you please share the high-level architecture of your current intranet?	On-premise. We use Interact Intranet, which is based on Windows and SQL.
What kind of SharePoint licenses you have?	Office 365 E2
How many current SharePoint licenses you have?	Currently 6000 Office 365 E2 licenses.
What are the external tools to be integrated with intranet?	None during Phase I.
What additional features which are not to be part of Office 365 suite and are targeted for this implementation?	N/A
What are the workflows you plan to implement as part of this project? What are the processes you want to automate as part of project? What level of workflows you wanted to have (Ex 3 levels)? Are you looking for out of box workflow or custom workflows are also part of scope?	Standard document management workflows. Dashboard roll-up workflows. Procurement/Contract progression/approval workflows. HR Onboarding/Offboarding workflows. Workflows to be gathered during discovery/requirements gathering.
How many users are to trained as part of project?	Train the trainers and power users. Approximately 50 total (12-14 department admins/35 Power users)
Can some part of work be done offsite?	The vendor can complete work offsite. EGPAF will also provide vendor with space at the Washington DC HQ office should the vendor choose to work at our facility.
Are you also open for Offshore execution of work?	The vendor can complete work offshore. EGPAF will also provide vendor with space at the Washington DC HQ office should the vendor choose to work at our facility.
In cost sheet, we assume vendor needs to provide only rate for each proposed role category, please confirm?	Yes, your assumption is correct. Please provide time and materials, role rate and how they roll up.

Please share more information on Application IT services desk/helpdesk module? What technology it is built on? Who developed it What is the primary objective of this module	A portal to the IT Help Desk software. We currently use BMC Track_It but are evaluating other help desk systems.
Please share more information on 'action tracker application' and 'executive team dashboard'?	We expect these to be OOTB workflows.
What tools are you planning to use for communication, chat, meeting, and reporting?	We utilize various tools, primarily Zoom, Microsoft Teams, and PowerBI.
Are you using some other tools such as Power BI, Flow etc. If yes, please provide more details?	EGPAF is in the process of introducing Office 365 applications across the organization. Currently we are piloting usage with the IT department. However, several units have been using SharePoint/Teams and PowerBI on their own. We are interested in a fully integrated collaborative solution using Office 365 applications.
What is tentative Go-Live dates for project? Please share the same for Phase I? Phase II?	Q4 of 2020 for Phase I.
We request Department to extend proposal due date by 2 weeks?	No
How many pages the current intranet have?	Approximately 2908 pages
Has the Active Directory configured and role assigned for users?	Yes
Are you open for any vendor recommended tools for ease of development, migration etc?	Yes. We are always open to vendor recommendations.
What is allocated budget for the project?	EGPAF has budgeted for this project, however, we do not traditionally share this.
Have you configured the ADFS services?	Yes, we use Okta for Office 365 authentication.
How many departments are there in picture?	Approximately 56 departments
How many site collections currently exists?	We do not currently use SharePoint in that manner as our intranet. We are only using Office 365 SharePoint sites.
How many web applications are there in you farm?	N/A
How many site collections are there in each of the Web Applications? Please list web application and respective site collection count.	N/A
How are sites currently structured? Are they structured based on Department, Projects, or any other? Please provide more information to help us understand your Information Architecture.	N/A
What is the size and volume of data to be migrated?	20-30 GB for existing intranet. We expect growth in data with new intranet.

Do you plan to re-architect the current site architecture and hierarchy or keep the current ones as is when moved to online?	We would like to design our new intranet from the ground up.
Do you already have license for any migration tool? Do you have any reservation for purchasing of third-party tools for migration?	No / No but cost is always a consideration.
Are there any third-party tools, web parts used in your current environment	No.
Have you done customization to sites? What type of customizations are done to SharePoint?	There are no customizations.
Do you have any custom solutions deployed?	No.
Are there any custom site definitions?	No.
Please provide details on any Custom Developed Solutions (e.g. Event handler, web parts, timer jobs, custom workflow etc.)	N/A
How many custom developed solutions do you have?	N/A
How many InfoPath forms are there?	To the best of our knowledge, one department (Awards & Compliance) uses Infopath to a limited extent.
Do you have any Administrator approved InfoPath forms i.e. InfoPath form that have any C# code. If yes, how many?	N/A
Is user profile service being used in InfoPath forms?	N/A
Are these InfoPath forms list forms or are they standalone forms?	Stand alone
Please confirm these InfoPath forms are AS-IS migration i.e. they will be migrated as InfoPath forms and will not be rewritten in a different technology like PowerApps.	We would expect any current workflows to be rewritten.
What type of workflows are there in your current system?	N/A
Are there any Out of the box workflows? How many?	N/A
Are there any SP Designer workflows? How many?	N/A
Are there any Visual Studio State sequential or state machine workflow? How many?	N/A
How many workflows are present and required to be migrated?	N/A
What is the complexity of workflows present in the system?	N/A
How many stages are there?	N/A
Is there any integration with other system?	N/A
Do you current SharePoint have integration with any other legacy system for fetching or pushing data?	We currently do not use SharePoint in this manner.
Do you have any content source that are outside SharePoint like Network File share, external intranet applications, etc	No

Are there any custom scopes defined in Search Service?	No
Are there any Managed Properties used?	No
Are there any Search Web Parts configured on other pages than Search Centre?	No
Have you undertaken the data clean-up activity or is this part of this engagement	No. We would like the vendor to recommend their preferred approach.
Are you looking to convert all sites to modern UI?	We would like to develop our new intranet utilizing modern UI.
Do you have any custom master pages?	No.
Do you have any custom page layouts?	No custom page layouts on the existing Intranet
Do you have any custom CSS and scripts?	Not currently.
Are you looking for Minimal Customization for Branding i.e. more of the out of the box UI with use of SP Theme engine or are you looking for advanced branding with complete redesign of UI, new page layouts and master pages?	Minimal customization of branding.
Do you intend to use Teams, Power Apps, Power Automate and other Office 365 offerings for your collaboration needs?	Yes. EGPAF is introducing Office 365 applications to the organization during the 2nd/3rd quarters 2020. EGPAF would be amenable to vendors input on utilizing Office 365 applications in conjunction with the development of the Intranet.
What type of License do you have?	Office 365 E2
How many users will be accessing the SharePoint online system?	Approximately 3000.
Will Phase 2 also be considered in current scope?	Phase 2 is not to be included within this scope. The decision to bid out Phase 2 or maintain relationship with the chosen vendor will be at the discretion of EGPAF.
Can you confirm what level of Office 365 licensing do you own? I.e. E1, E2, E3?	Office 365 E2
Is EGPAF licensed for Active Directory Premium P1 or Enterprise Mobile Suite or Microsoft 365?	Office 365 E2
Have you done an analysis on the current Intranet? Engagement? Most used features?	No.
How many workflows and forms are running in the current Office 365 environment?	N/A
Do you have an existing preferred Microsoft vendor or Digital Partner of Record (is so will you kindly identify them)?	EGPAF does not traditionally provide this information.

A - Project Management: Will EGPAF consider using an Agile/Iterative methodology?	Since this will be a vendor drive project, we can adjust to any project style either Waterfall or Agile.
B - Governance Plan – Will the plan that EGPAF develop include governance of other Office 365 workloads (I.e. Microsoft Teams, OneDrive, Stream, etc...)?	Yes.
C – SharePoint Build – Can EGPAF share to what extent SharePoint Online is used currently (how many sites, workflows, forms, etc...)?	Basic level usage.
Are there expectations to support multi-language in the intranet?	EGPAF staff in Africa speak French, Continental Portugese, and Swahili. We would consider a multi-lingual solution based on availability and budget.
Have you performed an analysis of business objectives and business capabilities?	Business objectives have been defined and approved by EGPAF executive leadership.
If not is the vendor expected to interview stakeholders? Any particular department/departments and how many stakeholders are expected to be interviewed?	Yes. We are not fully aware of all of SharePoint's capabilities and would expect the vendor to provide assistance in this area.
Is there an expectation for the implementation team to be on site?	It is not necessary for the implementation team to be onsite. EGPAF will provide space and internet access at our Washington DC HQ if requested.
How many trainers are you expecting the vendor to train? Where are these trainers located? Is the expectation English only or multiple languages?	Train the trainers and power users. Approximately 50 total (12-14 department admins/35 Power users)
Is EGPAF looking for a range of total cost for this implementation or only Time and Materials unit cost?	Time and materials per RFP, and a total cost estimate.
Timeline: Does EGPAF has a timeline for a Phase 1 and Phase 2 launch	Phase I by end of year 2020.
Who is the project sponsor responsible for the business capabilities and who is driving it?	Project Sponsor - Executive level individual. KM unit is driving this initiative.
Will EGPAF consider the use of a toolkit (open-source) that is licensed with source code to accelerate implementation and reduce risks (pre-existing IP) or any 3 rd party tool?	Yes, EGPAF will consider the use of toolkits to accelerate implementation.
1.Are you already an O365 customer?	Yes
1.Are you US Government Organization?	No
1.Are you an Education Organization?	No
1.Are you a Non-Profit Organization?	Yes
1.List all currently owned licenses and quantities	Currently 6000 Office 365 E2 licenses.

2.What is the status of each O365 workload in your organization and do you have any timelines in mind for deployment? (Disables/Planned (Date) /Enabled/Promoted)	We plan to evaluate Office 365 applications and deploy those that meet our needs throughout the year. We are using OneDrive and will be introducing SharePoint sites and Teams in Q2/Q3.
2.Exchange Online	Yes
2.Skype For Business	Yes
2.SharePoint Online	Yes
2.Teams	Yes
2.Yammer	Yes
2.Stream	Yes
2.Planner	Yes
2.OneDrive for Business	Yes
2.PowerApps	Yes
2.Power Automate	Yes
2.Power BI	Yes
2.Others (<i>Please Specify</i>)	N/A
3.Do you plan to purchase new licenses? If so, how many licenses and of which type do you intend to purchase?	No
4.What is your present Microsoft Licensing Model (answer yes)	Nonprofit Open Licensing
4.Microsoft Enterprise Agreement (EA)	No
4.Microsoft Products & Services Agreement (MPSA)	No
4.Open License	Yes
4.Cloud Solution Provider (CSP)	No
4.Web Direct / Retail Licensing	No
4.Not Sure / Don't have existing Agreement	No
5.How many physical locations does your organization operate from?	EGPAF has locations in 19 countries and over 5000 locations.
6.Are there any special organization configuration items that come to mind that we need to be aware about that can affect a migration or utilizing Office 365?	No
Do you already have your AD properly synchronized to Office 365?	Yes
Please list all supported operating systems and versions in use in your organization.	Windows 10
Which versions of Office are supported and in use in your organization?	Yes, while we use Office 2016 on all computers based in the US, our Africa offices support multiple versions, including 2013 and 2019.

Is there a need to keep older versions of Office on user's computers?	Yes, while we use Office 2016 on all computers based in the US, our Africa offices support multiple versions, including 2013 and 2019.
Which browsers and versions are fully supported by your organization's IT Department?	Google Chrome, Microsoft Edge, and Microsoft Internet Explorer 11
Do you allow your users to be local administrators on their computer?	No
Do you have a "bring your own device" (BYOD) policy?	Yes
Who are the key stakeholders from Business and IT for this project, what are their roles and where are they located?	Kevin Burr, Network Engineer Manager, Washington DC
Do you have any specific risk or cost avoidance factors that we should be aware of (impending licensing / support renewal, impending EOL for a product, etc., drop-dead date from management, etc.)?	No
Do you have a planned high level timeline that you are hoping to meet?	Yes, we would like this phase to be completed within 2020.
Are there any dependencies on other projects / parties that you are aware of that have not yet been communicated?	No. There are no dependencies that we are aware of at this time.
It is unclear in the RFP what technology and where your current intranet is hosted. Will you please clarify in detail the environment that currently hosts your intranet? Please provide as much detail as possible.	The current intranet is hosted by Interact, on-premise.
Do you plan to continue using Interact Software moving forward or are you moving away from that?	We plan to discontinue using our current Intranet provider, Interact Software, once the new Intranet is implemented successfully.
Have you Run Pre-Migration Analysis Reports on your Source Environments?	No. To date we have not run pre-migration analysis reports.
Can you provide some level context to how complicated and how many navigation nodes, metadata dimensions and content types you expect to include in your Information Architecture? Approximation is fine!	Unknown. We do not have knowledge to answer this question and rely on vendor guidance.
How many participants would you expect to be involved in an Information Architecture workshop series that includes review of current IA, card sorting, tree testing and more to define and updated classification taxonomy, navigational hierarchy and content structure?	Approximately 25 individuals.
Does your organization have an Enterprise Search tool? If so, what is being used (GSA, FAST, Lucene, Elastic, Solr, etc.)?	No. This would be of interest and we would be open to vendor guidance.
Does your Enterprise Search tool index the content in the system/s you immediately plan to migrate?	N/A

Do you expect that the enterprise search tool will also index content in the target environment?	N/A
The RFP says that search will need to "encompass internal and external files and or databases". If you are expecting to use SharePoint Search as your Enterprise Search tool, Are you expecting that SharePoint Search index content that is outside of Office 365? It sounds like this is the case... are you aware that this would require a Hybrid installation to keep Search on Premises? Is that something you are interested in pursuing?	We do not have knowledge to answer this question at this time and would rely on vendor guidance in this matter.
Please describe any other general search requirements / expectation that you have.	OOTB SharePoint search functionality is acceptable.
Does your current environment make use of custom forms that would need migrating?	No
Please provide any inventory of such usage, if available.	N/A
Does your current environment make use of workflow?	No
Please provide any inventory of such usage, if available.	N/A
Does your organization use any other BI tools that are visualized in your source environment that we need to consider in this migration?	PowerBI and Solver BI360
How much customization to the UX to you intend to make in the new environment?	Minimal.
What does your current site provisioning process look like? How do users request new places to collaborate and share information?	N/A. We are currently not using SharePoint as our intranet. There is no site provisioning.
Do you have a Governance Committee in place that oversees your current source environment?	Not at this time. We will have a governance committee in place for development.
How effective and current is this team with ensuring that your environment is well governed?	N/A
Will this same team be involved in overseeing the new environment?	A new governance committee will be in place for development.
If not, have you identified whom will?	N/A
Are there any specific regulations or compliance rules that your organization must abide to that could affect any of the systems being migrated from / to or the processes on how the migration is executed (FISMA, GDPR, CFR Part 11, etc.)?	Be conscious of CCPA, SB-1386, and GDPR.
Would you like to hear about URL Redirection options to ease the transition for your users, post-migration?	We do not have knowledge to answer this question at this time and would rely on vendor guidance in this matter.

Would you be interested to hear about options for locking source content & containers immediately after migration to ease the transition for your users?	We do not have knowledge to answer this question at this time and would rely on vendor guidance in this matter.
Do you have a Change Management process in your organization that you intend to apply as a part of this project?	No, at this time we have no change management processes in place.
Do you have a Change Management team in your organization to assist with this transition (Communications Lead, Training Personnel, Champion network)? Will they be involved in the project? In what capacity?	No, at this time there is no change management team in place.
Do you have a Help Center or any other training tools or services that you have already purchased or reviewed with relation to this project? Do you have any expectation about those being used?	We currently use Track-IT and are exploring ZenDesk.
What is your general inclination as to how much assistance your employees will need to adjust to the change this project causes / requires (1 - 10, 1 is little to no help and 10 is significant hand-holding required to ensure the change is received well and that your organization benefits from it)	10
The only ACM related asset requested in the RFP is a Training Plan... are there also expectation of deliverables like a Communications Plan, Comms templates, Champion Network Readying, HelpDesk Readying?	Unknown. We would be open to vendor guidance.
Does your current intranet solution support external access? Do you expect to need this migrated to Office 365?	We will require external users to have access, if not to the Intranet, then to Office 365 SharePoint sites and Teams.
Do you have a requirement for multi-lingual support in the new target environment?	EGPAF staff in Africa speak French, Continental Portuguese, and Swahili. We would consider a multi-lingual solution based on availability and budget.
Do any of your current environments that you intend to migrate as a part of this project already have multi-lingual support & content?	No.
Do you have any specific Recovery Time Objective, Recovery Point Objective or other backup / restore requirements?	Backup will be discussed with the winning vendor.
What is your current process / tooling for backup and restore?	This will be discussed with the winning vendor.
Are there any other 3rd Party tools are you using with your current Content & Collaboration Solutions?	No.
Do you specifically intend to use any of the 3rd party tools (including those for forms & workflow) in your new environment?	We are interested in OOTB and using InfoPath and Nintex workflows. We do not have any 3rd party tools we are interested in using at this time.

Are you more inclined to review replacing 3rd party tooling with OOTB functionality, where possible, or moving forwards with the 3rd party tooling as-is?	N/A. There are no 3rd party tools.
Please provide inventory and any supplemental information on in-house built customizations that require rebuilding / branding.	N/A. There are no in-house built customizations.
As per RFP, we have a statement saying "Integrate IT service desk/helpdesk module". Can we get some more detail on this? Is this will be a custom solution that needs to be built from scratch?	A direct link into our service desk/help desk. This can be done via an API or other methods. The goal would be to allow users to have "help guides" appear and if they didn't solve the problem they could launch a support ticket.
The RFP says that "All instances should be identically configured" - what does that mean? Which systems? Do you have multiple Office 365 tenants?	We have multiple tenants but the scope of this project only encompasses our pedaids.org tenant.
We typically use a global resourcing model that includes team members from the US and India. Does your organization allow for a global resourcing model?	Yes. global resourcing is acceptable.