



**RFP 22-006 – NCRNET SHAREPOINT 2016 PORTAL MIGRATION
ADDENDUM 4
Q&A #3 AND SECOND EXTENSION**

This addendum answers questions submitted by the deadline, April 13, 2022. No further questions shall be accepted.

Due to the extended time it took to compile answers, the due date for proposals shall be extended. Proposals shall be due by **Wednesday, May 11, at 2:00 PM EDT.**

Questions are in bold, **Answers** are in red. Where multiple questions were submitted addressing the same topic, they have been grouped under a single number.

Regarding IV.Background.B:

1. **Is 'secure document repository' the only function of the NCRNet SharePoint Portal ('Portal') or does it also have other functions? If so, what are those other functions?**
 - a. **We would like full functionality in the new version, including email. The current version is primarily used as a document repository and collaboration platform.**
2. **Does the portal provide any records management functionality on the documents and, if so, does this need to be migrated? In other words, is SharePoint used to organize documents for records management and enforce retention schedules?**
 - a. **We are not using it for formal records management, but we do have versioning turned on for most lists and document modules to track changes.**
3. **Are the documents tagged with metadata that would need to be migrated?**
 - a. **The documents have versioning and authoring data.**
4. **'The portal has no custom coding'. Are the Content Editor, Script Editor, or Content Query web parts used, and if so, how extensively? Are OOTB workflows used? Are publishing and content approval features used?**
 - a. **We use three Content Query Web Parts on each site, but it may make sense not to port these over and create something better with the Modern functions. There are some content editor boxes. We have some JavaScript code to show the document module folder breadcrumbs; again, we are hoping this is not needed in Modern.**
5. **What technologies does the IAMS solution employ?**
 - a. **From the proposer's perspective, IAMS integrates with SharePoint via OpenID Connect and AzureAD Graph APIs.**
6. **Approximately how many documents are there in the portal?**
 - a. **Several thousand.**

7. How many site collections are there in the portal?
 - a. See Addendum #1, Question 4.
 8. Does the portal use master pages and page layouts and, if so, how extensively?
 - a. We are using OOTB SharePoint 2016 site pages. We have manually set most sites as two columns on the home page.
 9. Are there specific compliance mandates governing and of this content and, if so, will the vendor be responsible for setting compliance up in Office 365?
Are there any regulations you must comply with when sharing content with External Users?
Are you legally bound by any regulatory compliance standards? If so, please identify.
 - a. No.
 10. Regarding V.A.3: Does COG envisage a solution where users are automatically authenticated with their organization credentials (i.e. no other user accounts created and no explicit login)?
 - a. New Sharepoint online still will have Integration with the IAMS.
 11. Regarding V.A.4, what document types are restricted to IE in the current portal?
 - a. Word, Excel, and PowerPoint documents are more difficult to open and edit in the current installation if not using the IE browser.
 12. Regarding V.A.5, what specific email integration scenarios COG is looking for?
 - a. We would like users to be able to launch an email from within a SharePoint site to site members. We may also want the site to be able to receive email to display.
- Regarding VI.C.1:
13. Will the content be reviewed and cleaned up before migration and if so, is this to any degree a vendor task?
 - a. Some content will not be ported over. Cleanup will primarily be a COG task.
 14. Does COG envisage re-architecting or redesigning the portal as part of the migration or is this a 'like for like' migration (allowing for differences in SharePoint versions)?
 - a. There may be some redesign of the portal based on Modern capabilities, but it will mostly be "like for like."
- Regarding VI.C.2:
15. Is it correct that this is an automated/semi-automated provisioning solution for bringing users from the source systems into the appropriate Azure AD groups?
 - a. Yes, IAMS will automate user onboarding.
 16. In addition to developing the provisioning solution, is the vendor also responsible for developing the mappings of users to groups or will these be provided?
 - a. Users and Groups will be managed by IAMS. Vendor will be responsible for onboarding Groups and integrating into permissions for sites.
 17. Regarding VI.C.6: In addition to configuring Azure AD to work with IAMS, is the vendor also responsible for designing the SharePoint integration into IAMS, or will this design be supplied?
 - a. Vendor will work with the IAMS team, but the IAMS team will be responsible for SSO and user onboarding configuration.

18. Regarding VI.C,7- Ensure browser-independent access to the SharePoint 365 portal: Does COG have any ADA requirements?
- No.
19. Regarding VI.C.9, what groups are to be trained, and can this be done in train the trainer mode? Is the actual amount and type of training to be recommended by the vendor or does COG have a definition? Is this training focused on just the new features made available in SharePoint Online?
In the RFP document VI C #9, training is to be provided to how many users?
- Approximately ten users.
20. Under V A #1, it says, 'The current SharePoint 2016 deployment is outdated in terms of functionality and features.' Can COG provide details of what specific functionality and features they are looking to adopt?
- See Questions 1 and 11, above.
21. Under VI C #10, it says "Provide documentation.", please specify what documentation is needed to be delivered as part of this.
- Technical document of new SharePoint365 setup. Architecture, Infrastructure, Configurations, retention Policies, others etc.
22. Under VI C Deliverables # 1, it says "A new NCRNet SharePoint portal hosted on Office 365 (with all previous information migrated);" Do we need to create any custom designs for the portal?
- No.
23. Is COG using MS Teams?
- Yes.
24. Under VII A, it says that the project should be completed within six (6) months of the kickoff. Is there a hard Go-Live date? Can COG provide the anticipated start date of the project?
- There is not a hard go-live date.
25. How many licenses does COG has for SharePoint Online and what type of licenses they are?
- Non-profit E3.
26. Please provide details of the total number of concurrent users accessing the current portal?
- Concurrent users vary. Typically it would be between 20 and 50.
27. In the RFP document VI A, it says, migrate '1 Microsoft SQL Database Server', is this an application? What type of content do they have on this server?
- Current Sharepoint content.
28. Is COG looking for any kind of post-migration support and related cost to be included in the proposal for this? If so, for how many days?
- No long-term post-support is required.
29. Please enlist all Integration points (Interfaces) with any External LOB and other applications/ software if needed to be included as part of the scope and at what level.
- IAMS, see section VI.

30. Are any migration tools preferred to migrate to SharePoint Online from on-premises and are licenses available for the migration tool?
- Use standard/approved Microsoft migration tools.
31. Please share any governance plan for the SharePoint environment to be implemented.
- COG declines to answer this question.
32. What's the main kind of content that's stored in SharePoint? (Text content, Documents, Images, flash, audio, Videos, other formats, etc.)
- The content is primarily documents in PDF, Word, and Excel. There are some audio and video files in various formats.
33. Is there any other Content Management or Document management tool in place along with SharePoint?
- No.
34. Are the SharePoint sites secured (Using SSL, encryption)?
Please provide details about the SSL certificates used for SharePoint sites.
- Current SharePoint is using SSL.
35. Who is the incumbent Vendor who provided the SharePoint 2016 implementation to COG?
Will the Vendor who provided the SharePoint 2016 implementation to COG be bidding for this project?
Will any preference be given to the incumbent?
- It was handled in house.
36. Which Vendor is supporting the existing environment?
- Internal IT staff are handling it.
37. Is COG open to fully Remote work from the Vendors office for this engagement, without any onsite presence in COG offices?
- See Addendum #1, Question 13.
38. Is the use of Offshore developers from another country acceptable for the project?
- See Addendum #1, Question 13.
39. What is the budget allocated for this project by COG?
- See Addendum #2, Question 4.
40. Is the allocation of any work to the DBE firm mean we have to consider the DBE firm as our subcontractor?
- Yes.
41. The participation point given in IX.D, means, if we commit to giving 10-14% work of the awarded Contract value to the DBE firm we will be given 3 points out of the available 15 points and if someone else commits to giving 35% or more of the awarded amount, that vendor submitting the proposal will be given 15 points as part of the Evaluation criteria of the proposal. Please confirm.
- That is correct.

42. If a firm responding to the proposal is in itself a DBE firm (Prime), will that firm be awarded 15 points directly, without having to subcontract anything to another DBE?
- That is correct.
43. In XI. PROPOSAL INSTRUCTIONS #9, it asks for 'DBE Participation Form, and Certification from Qualified Vendors'. a. Can COG confirm and send the 'DBE Participation Form', as we are unable to locate any such form. b. Also, what to send as part of this requirement – 'Certification from Qualified Vendors'
- See Addendum #2, Question 3, and Attachment D to that Addendum.
44. Can we use a DBE firm certified by any state, or it should be Certified only by any agency in Washington DC?
- It is acceptable for other states, but evidence of these certifications must be provided as part of the Proposer's proposal in order to be scored.
45. Is it a requirement to use a DBE firm certified by USDOT recognized Unified Certification Program (UCP) only?
- No; they must be certified as a DBE.
46. Is there any format for the pricing proposal, or, the vendor can provide its format, please confirm, and share if pricing needs to be shared in any specific format?
- See Addendum #1, Question 15.
47. Is COG looking for a Fixed Cost pricing or a Time and Material pricing as part of the proposal response? In the RFP it says the Contract type is Time and Materials (T&M) under I. Summary, but in XII – Proposal Form, it asks for Fixed Cost (TOTAL Full Implementation Program). Please confirm.
The RFP refers to both "Time and Materials" pricing and "Fixed Cost" pricing. We can provide either (or both). What is COG's preference?
- See Addendum #1, Question 15.
48. Under XI B #7, It Says 'Section XI, Proposal Form', but Proposal Form is in Section XII of the RFP.
- Typographical error. The required document is Section XII, the Proposal Form.
49. If we want to make any exceptions to the 'ATTACHMENT A: TERMS AND CONDITIONS', in the RFP, should we a. checkmark the 'NO' option in the 'XII. PROPOSAL FORM', for 'Attachment A: Terms and Conditions (Acknowledge)' filed, and checkmark the 'YES' option for the '*Exceptions Taken (Attach to Proposal)' field. Or, b. Should we checkmark the 'YES' option for both 'Attachment A: Terms and Conditions (Acknowledge)' filed, and '*Exceptions Taken (Attach to Proposal)'. Please confirm.
- The Proposer should mark No to Attachment A and Yes to Exceptions.
50. Under 'ATTACHMENT A: TERMS AND CONDITIONS', 'XIII. Payments', talks of payment accepted through the P-Card system, but as a company, we only accept ACH or check payment methods. Does this disqualify us for the award for this opportunity?
- The Proposer must make this clear as an exception in their proposal, and it will be taken into consideration when evaluating responsiveness.

51. Under Section VIII C- "Contractor shall set up its billing system to ensure that invoices do not include sales tax. COG, and any other using Agencies, will provide certificates of exemption. for sales tax upon request", can we do this easily without the need for any special software or product?
- That is for the Proposer to determine. Invoices from the awarded contractor shall not include any sales tax charges to COG; how the Proposer accomplishes this is up to them.
52. We request COG to provide a minimum of two (2) weeks to respond to the RFP after responding to the Vendor's questions, so that we can understand the responses properly and prepare the proposal.
- See Addendum #3.
53. Please describe your current provisioning process for non-employees.
- This is handled by the IAMS program.
54. What type of user store is currently utilized? SQL, Twilio, NetForum, Active Directory?
- SQL and Active Directory.
55. How are permissions currently assigned to the various sites? Are users added directly to the sites, or are permissions driven through Active Directory groups?
- Added directly.
56. What percentage of overlap exists between the user bases of the various sites? What is the average number of sites that the typical user belongs to?
- This is uncertain. Most staff have access to most of the sites. Users may belong to multiple sites and subsites.
57. Is Multi Factor Authentication needed? If so, is there currently an MFA provider in place?
- MFA is provided through IAMS.
58. Do the 75-100 sites refer to site collections or sub-sites of one large site collection? If 75-100 site collections, how many total sites (sub-sites) are part of the portal environment?
- See Addendum #1, Question 4.
59. How many Web applications? How many content DBs and total size?
- See Section VI.
60. Is an information architecture redesign envisioned, or would the existing site structures be migrated using the same overall information architecture?
- Use a similar architecture.
61. Are any workflow solutions (i.e. Nintex, K2, SharePoint Designer, custom-built, etc.) currently in place within the NCRNet portal? If yes to the above, then how many total workflow processes have been built within the environment? If multiple workflow solutions are in place, how many workflows of each type are there?
- See Addendum #1, Question 11, and Addendum #2, Questions 11-13.

62. Do you have custom InfoPath forms or other forms looking to be upgraded?
Are SharePoint InfoPath Forms used in the current SharePoint 2016 environment? If so, please provide the count and complexity ratio of the InfoPath Forms.
- a. No. See Addendum #2, Question #8.
63. Do you envision an all-at-once migration (all sites at the same time) or distributed amongst multiple waves?
- a. All at once.
64. What communications and change management activities should be included as part of the scope of work?
- a. The Proposer may provide their recommendations as part of their scope of work.
65. Are links in documents and on-site home pages to other documents a consideration, and should the scope include conversion of those links to the new URL for SharePoint online, or would the responsibility fall on end users and content owners to update the links within their pages and content?
- a. Users shall update links.
66. Have you considered migrating to modern experience or working to replicate the current 2016 look and capabilities?
- a. See Addendum #1, Question 2.
67. What Microsoft 365 (formerly Office 365) plan is currently provisioned at COG?
Is Office 365 currently in use? If so, what license(s)?
- a. See Addendum #2, Questions #28-29.
68. Is the Microsoft 365 tenant solely owned by COG? Or, shared through another organization?
- a. It is solely owned COG.
69. Given approximately 2000 users, how many Microsoft 365 licenses have been purchased as of today?
- a. Most users will be guest account users.
70. What Microsoft 365 applications are used by end users other than SharePoint?
- a. Word, Excel, PowerPoint.
71. Does the organization currently use multi-factor authentication to access collaboration solutions (i.e., SharePoint)?
- a. Currently IAMS is used for authentication.
72. Please provide what media file types are stored in SharePoint document libraries (i.e., images, CAD, TIFF, video, audio).
- a. There are multiple media file types.
73. Please provide an approximate large file size supported in the current SharePoint 2016 environment (in GB).
- a. An example size would be approximately 2GB.

74. How are custom SharePoint content types leveraged in the current SharePoint 2016 environment?

a. See Addendum #1, Questions 8-9.

75. Are you planning to expose SharePoint online content to external users?

Do you have any requirements to allow/block external sharing or external users?

a. New SharePoint will have external users.

76. Please describe legacy system integrations with SharePoint environments.

a. There are none.

77. Do you plan to allow users to sync OneDrive with SharePoint Online?

a. Internal users already have OneDrive.

78. Do you have any process requirements for site collection creation? (i.e. request from a business team)

a. No.

79. Do you have any process requirements for content approval?

a. No.

80. Are there any specific requirements around branding?

a. No.

81. Are there any requirements regarding Responsive Design?

a. It should be RWD, out of the box with Modern. We would want it to look good on phones and tablets.

82. Have any SharePoint migration tools been acquired? If not, are you open to using/purchasing migration tools?

a. None have been purchased.

83. Can you confirm that the current SP 2016 portal is hosted in Azure?

a. See Addendum #1, Question 7 and Addendum #2, Question 30.

84. Is the current portal used mainly for document management?

a. Yes, but also for collaboration and contact list/inventory reference.

85. Does the current portal contain any of the following objects? If yes, please include counts.

Custom Web Parts	0
InfoPath Forms	0
Workflows	0
3rd Party Applications (i.e. Nintex)	0
Custom Masterpage(s)	0
Custom Site Templates	0

86. Is post-implementation training a requirement?

a. Yes.

87. Is your intent to move to Modern Sites in SharePoint Online?
- See Addendum #1, Question #2.
88. Is the SharePoint 2016 environment integrated with any other systems (other than IAMS and the Azure components listed in the RFP)? If so, please provide the application and version (or host).
- No.
89. Are there any change management restrictions, such as black-out dates, that may impact a migration schedule?
- No.
90. One of the reasons cited for moving away from SharePoint 2016 is that it “does not have email integration.” Is email integration in scope for the solution? If so, to what extent (i.e., alerts, automation or other) and which email platform(s) are to be supported?
- See Addendum #1, Question #6.
91. One of the requirements refers to “guest account provisioning.” Please describe in further detail. When you refer to guest accounts, do you anticipate unlicensed access? open access that does not require authentication? Other?
- No open access.
92. Is the domain currently federated with an IDP or is Cloud Authentication being used (Password-Hash Sync or Pass-Through Authentication)?
- IAMS.
93. Is IAMS used for User Provisioning in the Azure AD / Active Directory Tenant? If so, please describe the user on-boarding process as it relates to the current and future Sharepoint Environment.
- In the current process, yes. Users either register directly with IAMS or we receive spreadsheets of users to onboard. Once onboarded, COG staff add users to groups.

In the future, IAMS will automate onboarding into AzureAD groups via the graph API. New sites must have Groups used for permissions.
94. Can the Sharepoint Servers in Azure be accessed outside of the environment? Will VPN or DirectAccess be required to access the servers and data for the migration?
- Yes, they can.
95. Are Groups and Identities maintained on-premises or cloud-only?
- Cloud-only.
96. Is the Azure AD / Microsoft 365 tenant in a hybrid configuration or are M365 workloads cloud only?
- AD in Azure cloud.
97. Please describe the Cloud Authentication flow vs on the on-premises authentication flow including any differences.
- Authentication will be handled by IAMS.

98. Are the resources in Azure routing through a virtual firewall appliance in Azure, filtered via on-premises infrastructure or have direct access to the outside?
 - a. These will be managed in Azure.
99. How is the data being backed up from the existing SharePoint environment?
 - a. Windows server backup.
100. How will the data be backed up in the new SharePoint Online tenant?
 - a. SharePoint Online data backup. Retention Policies may be revised.
101. Are there any Data Loss Prevention (DLP) or data protection policies (such as unified / sensitivity labels) required to be configured or migrated to the SharePoint Online tenant?
 - a. Yes, configure retention Policies on new SharePoint online.