



ADDENDUM 1
August 15, 2024

This Addendum provides answers to questions submitted by the August 7, 2024 deadline.

The due date for proposals has been extended. The new due date for proposals is **Tuesday, September 10 at 2:00 pm Eastern Time.**

Questions are in normal print; **Answers are in bold.**

1. How many proposers do you anticipate selecting for this RFP?
See Section I, page 3. "Number of Contracts: One."
2. What is the approved budget or range allocated for this project by the COG?
\$20,000 to \$40,000
3. Could the COG please share the incumbent's name and clarify whether the current vendor/incumbent will also participate on this request? If yes, will there be any preference given to incumbent? If so, could you please confirm the previous three years budget/spend for similar services?
There is not an incumbent for the tasks in this RFP.
4. Can companies from outside the United States respond to this solicitation?
No.
5. Can the tasks related to the RFP be performed from outside the United States? Can the Vendor use a mix of Onshore (US-based) and Offshore (resources from the Vendor's offices in another country) to work on this project? Or is the COG explicitly looking for all work to be delivered by resources only from Continental US for this project? Please confirm.
No.
6. We request the COG to please clarify if remote work is allowed for this project and if there is any onsite requirement. Will on-site meetings be required?
Remote work is allowed, with occasional on-site work/meeting as needed.
7. Can you provide examples of the existing workflows that need to be automated?
Example 1: COG's current mileage reimbursement process requires completing and sending a spreadsheet via email to be further approved by email.
Example 2: COG's current new hire onboard or termination request to deploy or retrieve equipment is sent via email to IT.

8. Are there any specific repositories or types of documents that should be prioritized during the integration?
Documents that were scanned to hard drives during an earlier project involving digitizing archived paper documents will be prioritized.
9. Can you provide more specifics about the types and formats of the 30GB of documents currently stored on the portal? What volume of data resides outside the SharePoint environment?
Format is mostly PDF and MS Word documents. About 500Gb to 1Tb reside outside SPO.
10. Is the Office 365 COG Portal built over a classic or Modern site?
Classic site, but the layout is dated, needs to be reorganized.
11. Does the contractor need to develop forms?
Yes.
12. Does the COG Portal utilize any third-party plugins?
No.
13. Would Rebranding involve any predefined theme provided by COG?
Possibly, will be determined during assessment.
14. Could the COG please confirm if migration is also included in this project? If so, could you please clarify how much gigabytes of data needs to be migrated other than 30 Gb which is mentioned in the RFP?
About 500 Gb to 1 Tb of files, but exact number will be determined during assessment.
15. Are there any specific standards or tools required to be used for Project Management?
No.
16. What are COG's general Business Hours?
Monday through Friday, 9am to 5pm.
17. As it is mentioned in Scope of work that COG needs staff training on SharePoint Online, so we would like to inform COG that We follow the Best Practice of Training the Trainer (TTT) where we train identified "champions" who then train the end-users. Will this approach work for you?
TTT and Champions training will be necessary for those maintaining and responsible for updating documents in the SharePoint portal. However, we will require an all-staff "overview" training to acclimate end-users with the new layout, features, and workflows.
18. What is the expertise and familiarity level of the users who need training on M365 SharePoint Online and other features? On a scale of 1-5, 1 = no experience and 5 = power users.
2 for most, 3/4 for a few.

19. Are there any existing Microsoft specific programs or training materials?
We currently use KnowledgeWave for Microsoft training. All COG staff have access to this training. Staff will be referred to this training medium for general SPO training.
20. For end-user documentation, the vendor can use Microsoft documentation wherever possible. Is the COG in agreement with this?
Yes.
21. Do you want the proposal to include options for ongoing support post the Training/Knowledge Transfer phase?
Yes.
22. Do you have a Communications office, and will they be involved with the communication campaign?
Yes, COG does have a Communications department. That department will not be involved in the communications campaign. That department will provide requirements/input for their section of SPO as will other departmental stakeholders.
23. Do you need Trainings (Admin, Content Author & End User) around the SPO and Teams? No other workloads like OneDrive, etc. need to be covered?
Yes.
24. For the User Guides, we are planning to have 3 Guides (Admin, Content Author & End User Guides). Are these what you are looking for?
Yes, that should suffice.
25. Have you recruited an Executive Sponsor, Project Manager and Tech Team along with Business Champions?
No.
26. Could you please confirm if the COG requires any post-implementation support? If so, how many hours of support per month does the COG anticipate needing after the go-live? Clarification on this would be helpful in estimating the cost.
No, but can be optional. Post-implementation support may entail adding new features as needed.
27. If COG requires support, please specify the duration of support you are anticipating from the vendor?
See Question 26.
28. For Technical Support, our understanding is that COG internal staff will provide the Level 1 (L1) resolution (typically first-level service to sort out the user issue through email and/or a dedicated call-in number based on documentation and user guides provided by the selected Vendor), and the selected vendor will provide the L2 (Level 2) and L3 (Level 3) services

where more technical skills are needed after the COG L1 team contact the selected Vendor's L2 team. Please confirm if this assumption is correct.

See response to Question #26, regarding post-implementation technical support.

29. Are there any specific Support SLAs that COG is looking at during the support period? If yes, please provide any existing SLAs and incident management priorities.

No.

30. What is the expected Support window that you may be looking at from the Vendor post implementation? Will it be 24*7 support or Business Hour Support (9 am-6 pm EST and 5 days Mon-Fri)?

See response to #26, regarding post-implementation technical support.

31. What type of M365 licenses do you have – GCC or E3 or E5?

Office 365 E3, non-profit.

32. How many licenses of each type do you have?

Office 365 E3 – 170

Teams Phone - 170

Microsoft 365 Business Basics - 160

33. How many users do you have? Please break out by internal staff and external users.

~130 (all internal)

34. We understand there is 30GB of data in your current SPO that needs to be reorganized into new SPO Architecture. How much data will need to be migrated from File Shares, OneDrive and Teams into SPO?

Between 500Gb and 1Tb.

35. The assessment request spoke of assessing SPO, we would like to include assessing the data from File Share, OneDrive and Teams. Are you in agreement with this approach?

Yes.

36. Do you have any Assessment/Migration tools in place today, such as ShareGate?

No.

37. How many network drives are there that need to be migrated to SPO? What is the size of content on those drives that need to be migrated?

Between 5 and 8. Size can be determined during assessment. Only some files on these drives will need to be migrated as determined by individual departments, not entire drives.

38. What are the external repositories to integrate into the portal?

Repositories include documents stored on external hard drives, on network share drives, and possibly on OneDrive.

39. What is the amount of data to be moved from these external repositories?
Between 500Gb and 1Tb. (actual amount will be determined during assessment).
40. Are you currently using any Subsites or Classic Sites in SPO or is it more Modern Sites and Architecture?
Classic.
41. How many SPO sites and MS Teams are there currently?
COG only uses 1 SPO site and 1 MS Teams.
42. Do you have any customizations in the current SPO environment that also needs to be migrated?
Yes, but minimal. There are a couple of 1-step workflow forms in the current SPO that will need to be migrated (example: Transit Subsidy request form). Full scope can be determined during assessment.
43. Custom SPFx webparts?
No.
44. Custom SPFx extensions?
No.
45. Azure functions?
No.
46. Custom themes?
No.
47. Any 3rd party webparts or tools being used in your SharePoint Online environment like Nintex, K2, Bamboo, etc?
No.
48. Are you using Content Type Hubs today? Are there custom content types in place? Please share details including # of content types.
No.
49. Are you using Taxonomy today (Managed Metadata term sets)? Please share details.
No.
50. Do you have categories of topics that your end users need to search for content using? Such as:
Subject = Document Type Tags = Training, Policies, Forms, Procedures, etc.
Subject = Audience Tags = All, Supervisors, etc.
Yes, Full scope can be determined during assessment.

51. How many forms and in what format do you have that you need us to recreate? Can you classify them as Simple, Medium, Complex?
2-3 simple forms.
52. How many workflows do you need us to create? Can you classify them as Simple, Medium, Complex?
3-4 workflows. Mix of simple and medium with approval routing for some. Full scope of can be determined during assessment.
53. Are the workflow processes in place? Or do you need us to guide you through requirements and help define the processes?
Processes are in place, but requirements definitions needed for some.
54. It sounds like you may need:
- 1 Home Hub site
 - Department Communication sites (using 1 comm site template)
 - External collaboration space for contractor/vendors (recommend using MS Teams for this need)
- Does this capture your needs? Or do you see needing additional Hub sites or other Comm sites?
A. and B. needed. C. may not be necessary or already implemented. No additional Hub/Comm sites needed.
55. Business will be involved in the creation of the data map which we will use to migrate to the desired location. It involves clean-up of the source location data. Delete, Archive, Move will need to be determined by the business. Will that work for your organization?
Yes. That will work for COG.
56. Do you want the proposal to include options for ongoing support post the Training/Knowledge Transfer phase?
Yes, 1 year of optional support with possible renewal.
57. Are there pre-defined labor categories from MWCOG?
No.
58. Proposers shall provide an outline of their corporate experience along with references from at least three (3) other organizations of a similar size and scope. Is there a specific timeframe for which the past performance must be relevant (e.g., within the last three or five years)?
Within the last five years would be preferred.
59. Would past performance from commercial clients work?
Yes, if they were of a similar size and scope.

60. Do we need to submit a response in standard format Font 12 TNR, Size 8.5X11, Margin 1”, each side or do we have any other MWCOCG specified format?

There is not a specified format.

61. Are there any page limitations for the technical proposal?

No.

62. Regarding DBE participation, on page 6 of the RFP under section VIII, it is mentioned that 'Failure to have DBE participation does NOT disqualify a firm from being awarded a contract.' However, on page 13 under section III, DBE Assurance, it is mentioned that 'Failure by CONTRACTOR to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract.' In this context, could the COG please confirm if a vendor will be disqualified or viewed negatively if they choose not to fulfill the DBE requirements, considering the DBE goal is 15% and it carries a 15% weightage in proposal evaluation?

A vendor will not be disqualified for not having DBE participation. However, DBE participation is worth up to 15% of the score.

63. Regarding DBE participation, we seek clarification on whether a vendor needs to include proof of a DBE partner's certification in the proposal response. If yes, could you please specify under which file (A or B) and section of the response, this information should be provided? Additionally, will you be providing a DBE participation form, as we did not find any form or instructions about it in the RFP?

The DBE participation form has been included as part of this Addendum, and shall be considered Attachment D.

64. On page 6 of the RFP, under section IX, Evaluation and Scoring Criteria, two different scoring criteria for proposal evaluation are provided. One is given in description form and another is provided in table format, which has caused confusion regarding which criteria vendors should refer to. Please clarify.

Section IX, Paragraph B, was included in error and shall be deleted. The table (reproduced here) shall cover all of the scoring factors.

Scoring Factor Chart	
Factor	%
Technical Expertise Meeting Requirements	35
Deployment/Delivery Timeframes	20
Past Performance/References	15
DBE	15
Cost Analysis	15
TOTAL	100

65. Under section X, Proposal Instructions, section B outlines how the written proposal should be organized. However, we could not find any sub-section for writing the Scope of Work or Approach and Methodology in either File A or File B. Therefore, we request COG to please confirm in which section we should provide the Scope of Work or Approach and Methodology for the project. Can we add a sub-section for this purpose?
They shall be included in File A, the Narrative and Technical Proposal. They shall be inserted between the Executive Summary and Team Competence. See revised directions at the end of this document.
66. Under section IX, Evaluation and Scoring Criteria, in section B which outlines evaluation criteria in description form, the first criterion is technical expertise. Could COG please confirm what specific information you are looking for under this section? Do you want vendors to include the Scope of Work and Approach here, or are you looking for other information?
Section IX, Paragraph B, was included in error and shall be deleted.
67. Regarding the response submission, on page 7, it is mentioned that the written proposal should be organized to match the specified headings, and then we have File A and File B. Our understanding is that vendors need to provide a single response, within which we will have two different tabs/headings/sections for File A and File B. Please confirm if this understanding is correct.
The proposal shall be submitted as two separate files.
68. Regarding the response submission, please confirm whether vendors are required to submit two separate files, one for File A and one for File B. Please clarify.
Correct.
69. If a vendor wishes to protest an award decision, we request that COG please clarify the protest procedures.
Please reference the COG Procurement Policy, located at <https://www.mwcog.org/documents/2022/09/15/cog-procurement-policy-bids/rfps/>.
70. In Section X, Instructions, it is mentioned proposers need to complete the Proposer Qualification Form (Attachment B) and Contact Information Form Attachment C. However, provided Attachment B is a Non-Collusion Affidavit and Attachment C is References. Please clarify.
Disregard the references to the Proposer Qualification form and Contact Information Form.
71. Regarding the Price Proposal, it is mentioned in the proposal form to 'include a separate pricing proposal as part of the packet.' Our understanding is that vendors need to submit two proposals: the technical proposal as outlined in section X, and the pricing proposal. Please confirm if our understanding is correct.
Correct.

72. Regarding the Price Proposal, we understand that vendors need to provide pricing only in the proposal form as a fixed price. Please confirm if our understanding is correct.
Confirmed. Please provide a fixed price, including contingency amounts.
73. Is there a format or template that COG would like to be used when submitting the price proposal requirement?
Please display level of effort in person-hours as well as the firm fixed price with contingency.
74. For the pricing or cost, can we propose an hourly rate or are you looking for fixed price proposal? if it is fixed price can we base this on a number of man-hours over the six-month contract?
See Section I and Section XI. The price should be a firm fixed price to complete the project, including any contingencies.
75. Please specify which forms vendors need to provide with their proposal, along with the correct attachment sequence.
76. In the proposal form and in RFP, Attachment A refers to Terms and Conditions, but in section D, it refers to Proof of Insurance. Please confirm which one is Attachment A.
77. In the proposal form and in RFP, Attachment B refers to the Non-Collusion Affidavit, but in section D, it refers to the Proposer Qualification Form, which is not included in the RFP. Please confirm which one is Attachment B.
78. In the proposal form and in RFP, Attachment C refers to Proposer Experience/References, but in section D, it refers to the Contact Information Form, which is also not included in the RFP. Please confirm which one is Attachment C.
79. Regarding the Proof of Insurance (ACORD Form 25), do vendors need to provide this form? If yes, it is mentioned as Attachment A in section D of the proposal instructions, so please clarify whether Attachment A is Terms and Conditions or Proof of Insurance.
80. Is there an Attachment D? In section D, Attachment D refers to the Non-Collusion Affidavit, but in the proposal form, the Non-Collusion Affidavit is Attachment B.
81. Is there an Attachment E? In section D, Attachment E refers to References, but in the proposal form, the References sheet is Attachment C.
82. If vendors need to provide the Proposer Qualification Form and the Contact Information Form, please provide these forms, as we could not locate them in the RFP.
Please see the revised Proposal Instructions on next page.

X. PROPOSAL INSTRUCTIONS (REVISED)

A. Proposals should provide a narrative description of special experience, capabilities, and technical resources that will be contributed to this project by the submitting firm. The following points should be addressed in the narrative description:

1. A brief description of the Proposer's background and organizational history (including number of years in business and number of years performing services required by this RFP), and number of employees;
2. A description of the proposed methods to complete the required work, including level of effort and number of personnel assigned to the task.
3. Experience successfully completing projects of a similar scope and size.
4. Resumes of the key project staff who will be working on this project.

B. The written proposal shall be organized to match these headings:

1. File A: Narrative and Technical Proposal.
 - a. Letter of Interest
 - b. Table of Contents
 - c. Executive Summary
 - d. Narrative of Work
 - e. Team Competence
 - f. Prior Similar Projects Completed
 - g. Resumes of Key Project Staff**No pricing information is to be included in File A.**
2. File B: Price Proposal
 - a. Proposal Form
 - b. Pricing
 - c. All Documents Listed in Paragraph D, below.
 - d. Any Exceptions Taken to the RFP or the Terms and Conditions (Attachment A) must be included as part of File B. Exceptions **will not** be accepted after the submission of Proposals.

C. The requested Letter of Interest must be signed by an authorized principal or agent of the Contractor, and provide an overview of Proposer's offer, as well as a name, title, phone number, and email address of the person to whom questions may be directed concerning the proposal.

D. Proposers must include the additional documentation specified below in their RFP submission or they may be determined to be non-responsive and subject to rejection. See the Proposal Checklist below.

1. Each Proposal shall be accompanied by a NON-COLLUSION AFFIDAVIT (Attachment B) regarding price fixing, gratuities, bribery, and

discriminatory employment practices. When the Proposer is a corporation, a duly authorized representative shall execute the affidavit.

2. REFERENCES are to be provided from three (3) other clients who are being, or have been, provided by the Proposer with similar products, services, and scope of work (Attachment C).
3. A DBE PLAN GOALS SUBMISSION form must be completed (Attachment D).
4. Proof of insurance, in the form of an ACORD Form 25, must be provided as described in the Terms and Conditions (Attachment A of the RFP). It is not necessary to list COG as an Additional Insured at this time.
5. Proposer shall include a copy of their W-9.

(The remaining paragraphs of Section X are unchanged.)

XI. PROPOSAL FORM (REVISED)

TOTAL Full Fixed Price \$ _____
Include separate pricing proposal as part of packet, including additional details as necessary.

Required Attached Document Checklist

Item	Attached	
Pricing Breakout, Including Levels of Effort	YES _____	NO _____
Attachment B: Non-Collusion Affidavit	YES _____	NO _____
Attachment C: References	YES _____	NO _____
Proof of Insurance (ACORD Form 25)	YES _____	NO _____
W-9	YES _____	NO _____
Exceptions Taken*	YES _____	NO _____

* If any exceptions are taken, including the Terms and Conditions, please attach them on separate sheet(s) at the end of the proposal submission. **It is imperative that exceptions be indicated with the submission in order to evaluate the responsiveness of the Proposal. COG will not accept exceptions requested after the submission of Proposals.**

Addendums (if applicable)	Acknowledgement	
Addendum #1, August 15, 2024	YES _____	NO _____
Addendum #2	YES _____	NO _____
Addendum #3	YES _____	NO _____
Others _____	YES _____	NO _____

(Remainder of page intentionally left blank – signature section on next page)

Signature Section

I have read, understood, and agreed to the terms and conditions of all contents of this RFP. The undersigned agrees to furnish the commodity or service stipulated in this RFP as stated above.

SIGNATURE: _____

NAME: _____

COMPANY: _____

ADDRESS: _____

TELEPHONE: _____

EMAIL: _____

ATTACHMENT D: DBE PLAN GOALS SUBMISSION

DBE Participation YES ____ NO ____ (Please Check One)

PROPOSER	Name: _____	
Total Proposed Budget	Value: \$ _____	
DBE Plan	Yes ____ No ____	
Check if Prime Contractor is a DBE ____ . Certification Form Must Be Attached to this form.	Certification # _____	Expiration Date: _____
DBE Certification	State: _____	Certification Type: DBE (must be DBE)
	Certifying Agency: _____	

DBE SUBCONTRACTOR 1	Name: _____	
Street Address		Tax ID #: _____
City, State, Zip		Website: _____
POINT OF CONTACT	Name: _____	Title: _____
	Email: _____	Telephone: _____
Subcontract Value	Cost \$ _____	Percentage of total ____%
DBE Performance Period	Start ___/___/___	End ___/___/___
DBE Certification	State: _____	Certification Type: DBE (must be DBE)
	Certifying Agency: _____	
Certification Form Must Be Attached to this form	Certification # _____	Expiration Date: _____

Copy for additional DBE subcontractors

DBE SUBCONTRACTOR 2	Name: _____	
Street Address		Tax ID #: _____
City, State, Zip		Website: _____

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POINT OF CONTACT	Name: _____	Title: _____
	Email: _____	Telephone: _____
Subcontract Value	Cost \$ _____	Percentage of total _____%
DBE Performance Period	Start ___/___/___	End ___/___/___
DBE Certification	State: _____	Certification Type: DBE (must be DBE)
	Certifying Agency: _____	
Certification Form Must Be Attached to this form	Certification # _____	Expiration Date: _____

Copy for additional DBE subcontractors

DBE SUBCONTRACTOR 3	Name: _____	
Street Address		Tax ID #: _____
City, State, Zip		Website: _____
POINT OF CONTACT	Name: _____	Title: _____
	Email: _____	Telephone: _____
Subcontract Value	Cost \$ _____	Percentage of total _____%
DBE Performance Period	Start ___/___/___	End ___/___/___
DBE Certification	State: _____	Certification Type: DBE (must be DBE)
	Certifying Agency: _____	
Certification Form Must Be Attached to this form	Certification # _____	Expiration Date: _____

Copy for additional DBE subcontractors

DBE SUBCONTRACTOR 4	Name: _____	
Street Address		Tax ID #: _____
City, State, Zip		Website: _____
POINT OF CONTACT	Name: _____	Title: _____
	Email: _____	Telephone: _____
Subcontract Value	Cost \$ _____	Percentage of total _____%

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RFP 25-001 DOCUMENT MANAGEMENT PHASE II: SHAREPOINT REDESIGN

DBE Performance Period	Start ___/___/___	End ___/___/___
DBE Certification	State: _____	Certification Type: DBE (must be DBE)
	Certifying Agency: _____	
Certification Form Must Be Attached to this form	Certification # _____	Expiration Date: _____

Copy for additional DBE subcontractors