BOSTON PUBLIC HEALTH COMMISSION

**Request for Proposal
Questions and Responses**

(Updated on12/6/2018)

Request for Proposal: RFP Migration and Redesign of SharePoint 2007 Intranet

Proposal Due Date: Monday, December 10, 2018 by 5:00 PM

Question Set 1: Posted on November 26, 2018

All Prospective Proposers: In reference to the proposal solicitation, the following questions and inquiries were submitted, and receive a response from Boston Public Health Commission below.

1. Question: How many web applications are available in the existing environment?

   Answer: BPHC Intranet has utilizes one (1) web application.

2. Question: How many intranet users are using the SharePoint 2007 application?

   Answer: BPHC currently employs approximately 1200 employees.

3. Question: How many workflows are currently being used?

   Answer: BPHC Intranet currently has 40 active SharePoint Designer Workflows however, we have 41 additional workflows on the same web application in our test area and on other sites that may be phased out.

4. Question: Are there any InfoPath forms being used?

   Answer: BPHC Intranet uses only 2 InfoPath forms. Most of the forms on the site are standard out of the box SharePoint forms and 2 or 3 of those forms have been customized slightly.

5. Question: Does your Intranet site use any timer jobs?

   Answer: BPHC Intranet has 25 active timer jobs.

Question Set 2: Posted on November 29, 2018

6) Question: The cost of IT projects can vary widely depending on budget. Our firm has delivered successful projects across various budget ranges. To help us better understand the goals of your solicitation, can you please approximate a budget range for this project? For example, is the anticipated budget range:
   a) Less than $50,000
   b) $50,000 - $75,000
   c) $75,000 - $100,000
   d) $100,000 - $150,000
   e) $150,000 - $200,000
   f) $200,000+

   Answer: The BPHC will select a vendor based on qualifications, the content of their proposal and a favorable bid amount.

7) Question: We have multiple Microsoft Gold and Silver Competencies and SharePoint Certified Masters, MVPs, Trainers, etc. Regarding certifications/credentials:

a) What Microsoft Partner Competencies (e.g. Content and Collaboration, Application Development) are required and what is the minimum level of Competency for each that meets your requirements (i.e. Gold or Silver)?

Answer: Microsoft Gold and Silver Competencies will be a plus, but not required.

b) Will the proposal scoring take our credentials into account?

Answer: Yes

8) Question: We have several projects that are executed 100% offsite and have been very successful with this delivery method. This allows us to offer the very best SharePoint resources (e.g. SharePoint Certified Masters) while reducing project duration and costs. Most of the projects we do *could* be delivered completely remotely however, we sometimes find it useful to be onsite during discovery meetings, trainings, etc. Considering the potential effect on project duration and cost, on a scale from 1 to 5 where 1 represents "100% *onsite* project delivery" and 5 represents "100% *remote* project delivery", what are your requirements for how much time the selected vendor is onsite at your location for project implementation?

Answer: No requirement, but "onsite as necessary" is preferred and the cost should be included in the response.

9) Question: Does the current implementation include:

a) Farm-level Solutions; if so, please provide details.

Answer: Aside from the solution pkg for the site itself we have to other small solutions that have be added to the site.

b) Customizations that involve custom code (e.g. C# or JavaScript development); if so, please indicate:
   i) If the source code is under source control (e.g. Team Foundation Server)

   Answer: There are a small number of custom web parts using C#. We are not using source control.

c) Any 3rd party products/components?   If so,

   i) Please list all 3rd party products and/or components (e.g. web parts)

   Answer: We have no 3rd party products

   ii) Is the chosen vendor expected to upgrade these components to the latest version? -

   Answer: N/A

   iii) Have you procured O365 compatible versions of these products? –

   Answer: N/A

d) Remote Blob Storage?

Answer: No

e) Integration to any systems that are external to SharePoint?

Answer: No

f) MySites and to what degree have they been customized?

Answer: We do not use MySites.

10) Question: Regarding external access to support "collaboration with external partners":

    a) How many users need external access?

       Answer: We expect Commission will have access via the SharePoint app however, with regard to collaboration with external partners, we are planning for the future and want to have this capability we expect through team sites. We are not sure of the numbers at this point.

    b) Will all external users login/authenticate to access the system or does anonymous access need to be supported?

       Answer: Login will be required

    c) Will these users have AD accounts (i.e. they could simply be added as members to an O365 group vs. having actual AD accounts)?

       Answer: We would like to explore these options further.

    d) What features of the system will external access users be permitted to use (e.g. access to certain documents only, all features, etc.)?

       Answer: In general, features available in a team site.

11) Question: Regarding branding and page layouts:

    a) On a scale from 1 to 5 where 1 represents no custom branding and 5 represents a completely custom branded implementation, how would you rank your current implementation?

       Answer: 3

    b) Is there a desire to keep the existing branding, understanding that it will have to rebuilt for O365?

       Answer: We do not want to keep the existing branding but may want to work with a color scheme and possibly some other minor branding.

    c) Will branding be consistent across all departments, sites, sub-sites, etc.?

       Answer: Yes

    d) How many custom Master Pages and CSS does the current solution employ?

       Answer: We use 1 master page for the site.

    e) How many custom site templates does the current solution employ?

       Answer: We use approximately 10 site templates routinely. Others exist however, they are used rarely or have been phased out.

    f) How many custom page layouts does the current implementation employ and how many do you expect will be needed in the new implementation?
       Answer: We are not completely certain of this at this time. We expect we will want layouts for the home page, department page, subpage and team sites. There may be a few more determined during discovery.

    g) Can you please provide screen shots of the current solution?

       Answer: This request needs to be more specific.

12) Question: Regarding your current use of and experience with SharePoint:

    a) For what workloads are you currently using SharePoint (e.g. collaboration portals, document management, intranet/extranet, ECM or ERM, workflow/process automation, BI, etc.)?

Answer: The site is primarily used for Intranet, workflow/process automation, document management and collaboration sites.

b) Is there an interest in enhancing or optimizing your taxonomy (e.g. adding specific Content Types, reducing the number of Content Types using inheritance, or acquiring industry or functionally-specific term sets)?

Answer: Not at this time.

c) What, if any, problems or dissatisfaction have you experienced with SharePoint?

Answer: Searchability, ease of use, difficult to customize.

d) On a scale from 1 to 5 where 1 represents "None" and 5 represents "Expert", can you please indicate what SharePoint skills you currently have in house in terms of:
   i) SharePoint Infrastructure, Administration and Maintenance - Answer: 3
   ii) Information Architecture Design and Implementation - Answer: 2
   iii) Content Owner/Authorship – Answer: 4
   iv) PowerShell and C# Development – Answer: 3

e) Which service applications are installed/configured in the current implementations?

Answer: N/A

f) Are there any errors being logged or issues with the health of the farm or any of the content databases?

Answer: There are some errors being logged primarily the Windows SharePoint Services 3 Error Event ID (8214) however, we rarely have issues with our SharePoint intranet environment.

13) Question: Will the chosen vendor be provided with direct, remote access to and Admin credentials for all SharePoint environments that are to be migrated?

Answer: Yes

14) Question: On a scale from 1 to 5 where 1 represents a local vendor within 50 miles of your operation and 5 represents a vendor in another state, what is your preference for this engagement? In other words, please rate your preference for a local vendor.

Answer: 1

15) Question: The RFP Timeline states "Vendor Demonstrations will be scheduled accordingly and will take place onsite" whereas, Table B – Demonstration states "The demonstration will be through a web-based presentation"; can demonstrations be provided remotely?

Answer: Yes

16) Question: Can you please provide a listing of the Site Collections that are to be migrated along with the size of each?

Answer: This will be determined during discovery. All vendors should include a discovery phase in their proposal.

17) Question: The RFP states that you have 1,200 employees; that notwithstanding, how many users should we account for as it relates to product pricing, implementation services scoping, etc.?

Answer: 1200

18) Question: Approximately how many distinct *working groups* (e.g. departments, project teams, business units, committees, etc.) will need their own "Modern Communications and Team sites"? Working Groups as used here refers to any group of people who perform similar or collaborative/complementary functions, work on the same documents with a shared taxonomy, have permissions to the content in and belong to the same O365 Group.

Answer: BPHC will build out the required sites as needed using team sites or other option. To be determined during discovery.

19) Question: Are there existing Nintex Workflows that need to be migrated and if so, is the ShareGate subscription you currently have the version with support for Nintex forms and workflows?

Answer: We currently do not use Nintex on our Intranet site but would like to use it going forward.

20) Question: Most of our customers use Nintex Enterprise; are you clear on, and open to a discussion about, the differences between Nintex Standard and Nintex Enterprise?

Answer: We are open to discussing this.

21) Question: The RFP states that "the Commission manages 200+ distinct projects"; if you require project sites in O365 for each of these projects:

a) Are each of these projects currently managed in SP2007 and if so, are they based on the Classic Project Site Template?

Answer: Some of our projects use Team sites, most do not. We would like to have the option to set up project sites as needed.

b) Are you anticipating using the Classic Project Site Template in O365 (i.e. there is no Modern Experience replacement for Project Sites yet)? If not, what is your vision to support these sites?

Answer: We do not currently use the classic project site and we do not need to use the classic project site moving forward.

22) Question: Can you please provide use cases and additional details about the requirement stated as "Create and implement new style customizations per requirements"?

Answer: Will be determined during discovery. We expect minimal customizations and branding styles.

23) Question: The RFP indicates that "a mandatory pre-bid conference must be scheduled by all interested parties"; how and when do we do this?

Answer: Two pre-bid conferences will be held, one on 11/26 and one on 11/29. See the posting for this RFP on www.bphc.org/rfp for details on attending the conference.

24) Question: Will Certified Small Businesses from any state receive any special consideration in this procurement?

Answer: No

25) Question: What is your vision for post implementation support in terms of anticipated number of hours per month?

Answer: At the present time we are not anticipating an ongoing support contract.

26) Question: If you currently have a set of approved vendors that provide SharePoint/O365 services and/or have worked with a specific vendor in the past 12 months (e.g. from a prior solicitation or project engagement):

a) Please list all such vendors and indicate your satisfaction with the services provided as either "very satisfied", "acceptable", or "unsatisfied".

Answer: N/A

b) Are these vendors permitted to participate in this solicitation?

Answer: N/A

27) Proposals are due less than one week from the final submission date for bidder questions, which may not be answered for several days. In order for all bidders to incorporate the answers into our proposals such that we provide proposals of the highest degree of accuracy and quality, will you please extend the proposal due date to December 10, 2018 or later?

Answer: The due date has already been changed to 12/10/2018. See addendum 1 for this RFP at www.bphc.org/rfp

28) As an environmentally-friendly / Green company, we strive to reduce our consumption of paper; to that end, can respondents submit proposals electronically via email in lieu of hard-copy proposals?

BPHC will accept 1 hard copy and a PDF file of the entire proposal on a flash drive.

29) Question: How many pages need to be migrated?

Answer: This has yet to be determined but far less than are currently on the site.

30) Do documents link to other documents?

As far as we are aware, no documents link to other documents.

31) Will we keep old and new sites online for a time period?

We may need to do this. To be determined.

32) Will you perform assessment before migration?

Answer: We have ShareGate but it does not do surveys or reports on SharePoint 2007. The SharePoint migration tool also does not provide a migration report for SharePoint 2007.

33) How complex are your workflows – for example, are there hard-coded values?

Answer: We do not believe our workflows are very complex.

34) Do you plan to migrate all workflows?

Answer: We plan to migrate all workflows that currently in use and critical to day to day operations.

35) Have all users been integrated to Azure AD?

Answer: No

36) Does the scope include anything related with AD?

Answer: Possibly. We have questions about how external partners can securely collaborate with us is SharePoint Online.

37) Will vendors be required to build team sites or provide guidance?

Answer: At present we feel that only a team site template will be required. BPHC can build out the sites as needed.

Question Set 3: Posted on November 30, 2018

38. How to make proposal when scope of migration is not clear?

    Answer: Vendors should do their best to provide an estimate on discovery, design, migration, development and implementation and may also provide itemized quotes for specific tasks. For example, the cost to design one page/site template or cost to migrate X number of data/documents.

39. What if discovery phase uncovers that scope is larger than originally thought?

    Answer: Based on the outcome of the discovery phase, if the scope does not meet the BPHC budget requirement, BPHC will make adjustments to the desired features and functionality to meet our budget.

40. Is a discovery phase part of the proposal?

    Answer: Yes

41. What is the O365 subscription model?

    Answer: G3

42. Is there secure information in intranet?

    Yes, our Intranet site does contain some HIPPA related information

43. What is needed for external partners?

    Answer: BPHC would like partners should have login access to team sites they are associate with.

44. Are external partners going to be in AD?

    Answer: This is to be determined. BPHC is open to all options.

45. Will vendor need to set up teams/time sites as part of proposal?

    Answer: No. BPHC will most likely want to have a team site template and systems in place to allow external partners to log into a team site they have permissions to however, BPHC will build out those team sites as needed.

46. Is metadata set up in existing intranet?

    No. BPHC would like to explore this for the new site.

47. To what extent will metadata be used in new intranet?

    Answer: Initially BPHC suspects they will want to incorporate meta data to improved search for documents and sites.

48. How will we determine ADA compliance? What tools will be used?

    Answer: We currently do not have a dedicated too for this process.

49. Can work be done outside US?

    Yes, however BPHC is only accepting proposals from US companies.

50. What is the budget ceiling for this project?

    Answer: $100,000

51. For the custom C# work in intranet, will vendor need to migrate and fix anything that is broken?

    Answer: BPHC will want the selected vendor to attempt to migrate these features but will not be required to repair any custom code that is broken. BPHC will be responsible to repair/rebuild those workflows/processes.

52. On what floor will we be delivering the RFP response to?

    Answer: Proposals must be delivered to the 2nd floor reception desk at 1010 Massachusetts Ave, Boston, MA. 02118.

Question Set 4 Posted on 12/6/2018

53. Number of Site Collections:

    1

54. Number of Sites?

    876 (based on list of sites from Site Directory in SharePoint)

55. DB Size:

    70 GB

56. No. of Files:

    Unable to determine at this time.

57. Largest File Size:

    Estimate 50 mb

58. Number of Departments:

    Approx. 100 (Departments, Divisions, Service Centers, Programs combined). Current plan is to move over only the essential departments and programs.

59. Sites with custom forms:

    2 (Emergency contact and ITS Time Off)

60. Number of workflows?

    81 (about half are test workflows)

61. Active Timer Jobs?

25