# City and County of San Francisco TECHNOLOGY MARKETPLACE RFP

**SFPUC SharePoint Online and Records365 Rollout - Request for Proposal**

RFP Contact:

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### Background and Summary

The San Francisco Public Utilities Commission (SFPUC) has rolled out SharePoint 2016 (on-prem) to offer functionality ranging from Intranet sites, extranet, collaboration, workflows, forms, and records management. We are seeking assistance from a qualified and experienced firm to provide assistance with migrating from SharePoint 2016 to SharePoint Online (SPO) and roll out Records Management using Records365 (from RecordPoint). The goal is to provide a unique and consistent experience to users while we operate in the hybrid mode, develop governance for SharePoint Online and its related products like One Drive for Business, O365 Groups, Teams, Planner, Delve, etc. and enforce these governance policies via custom scripts and/or DocAve. Firms with relevant experience that meets the minimum qualifications set forth herein are encouraged to submit a proposal in response to this RFP.

Purchase Type Professional Services

Purchase Order Not to Exceed Amount $850,000.00**\***

Start Date May 2019

**\***A purchase order issued pursuant to this RFP will be funded as budgeted funds are made available. The following table sets forth the approximate funding dates for this purchase order. Services requested and rendered at any time during the project shall not exceed the then available funds on the purchase order.

|  |  |
| --- | --- |
| **Funding Date** | **Funding Amount** |
| Initially, upon PO issuance | $146,000  |
| On or before 8/1/2019 | $250,000  |
| On or before 8/1/2020 | $250,000  |
| On or before 8/1/2021 | $204,000  |

### RFP Schedule

Request for Proposal Issued Monday, March 5, 2019

Deadline for Questions Monday, March 12, 2019 (5:00 pm, PST)

SFPUC Response to Questions Monday, March 25, 2019 (5:00 pm, PST)

Deadline for Proposals Monday, April 1, 2019 (5:00 pm, PST)

### Questions and Communications

To ensure fair and equal access to information, please e-mail your questions to XXXXXX before the date stated in the preceding section. A summary of the questions and answers pertaining to this RFP will be e-mailed to all Technology Marketplace vendors by the date stated in the preceding section.

## PrOject Summary

SFPUC currently uses SharePoint 2016 (on-prem) as well have developed the SharePoint Online (SPO) UI framework to offer functionality to end-users in the following areas:

1. Intranet - news dissemination and communications portal
2. Enterprise and Departmental sites
3. Document Management
4. Knowledge Management
5. Records Management
6. Collaboration
7. Applications / Workflows /List Forms and InfoPath Forms
8. Extranet sites
9. Project Management

At this time, SFPUC seeks services and solutions to build out approx. 35 intranet departmental sites based on the new communication site templates and guidelines that have already been developed by the SFPUC team. In the process, content will need to be migrated from SharePoint 2016 to new SharePoint Online sites using the communication and traditional site templates. In the interim state, SFPUC has implemented the hybrid SharePoint infrastructure but at the end of the project, the goal is to fully migrate to SPO and retire the on-prem infrastructure.

In the hybrid mode, the intranet portal will provide a single point of entry for its employees, thus making all internal sites and content seamlessly accessible and discoverable based on everyone’s security permissions in SharePoint. SFPUC also seeks assistance in retrofitting the worksites with the correct metadata and content types so that Records365 rules engine can easily ingest the records and bring the relevant documents under the umbrella of Records Management with a file plan and disposition rules.

The project has three goals – one is to increase SharePoint adaption and end-users need to have a seamless experience between SharePoint on-prem and SharePoint Online via unified branding, consistent menus and search experience; second is to manually migrate content from on-prem intranet to SPO; and third to rollout records-enabled sites that can be ingested by Records365. The core success criteria for this initiative are as follows:

1. Develop departmental sites and conform them to SFPUC’s already developed design guidelines;
2. Perform migration of intranet as well as worksites from SharePoint 2016 on-prem to SharePoint online.
3. Retrofit worksites in SharePoint online with new content types and metadata to facilitate Records Management functions.
4. Establish new governance and best practices for administering SharePoint online and O365 product suite.
5. To comply with SFPUC business standards and industry regulations, need to implement Data Layer Protection policies to protect sensitive data from inadvertent disclosure.

The following tasks represent a non-exhaustive list of services requested pursuant to this RFP:

1. Build out approx. 35 departmental sites, based on the new communication site templates and conform them to SFPUC’s already developed design guidelines.
2. Implement hub sites where necessary to logically group the departmental sites.
3. Migrate content manually from the SharePoint 2016 Intranet to new SharePoint online intranet.
4. Migrate worksites (approx. 100 site collections) from SharePoint on-prem to SharePoint online using ShareGate and breakup or combine sites, when necessary.
5. Migrate documents from Hummingbird into SharePoint online sites using ShareGate.
6. Establish new governance and best practices for administering SharePoint online, O365 groups, and other related O365 products like Teams, Planner, Delve, etc.
7. Enforce the use of new governance policies using custom PowerShell scripts and/or DocAve tool.
8. Implement hybrid search and OneDrive for business.
9. Implement Data Layer Protection policies according to our business standards.
10. Develop tools and scripts to enforce governance practices at the site collection level in the following areas (this list is not exhaustive):
	1. Quota templates and notifications when size increases to predetermined level
	2. Security flagger for direct permission assignments and external shared content.
	3. Version scrubbing tool that allows for exceptions, if needed.
	4. Enforcement of business contacts at site collection level.
	5. Determine active account to be listed under Site Access account.
	6. Enforce consistent theme.
	7. Flag duplicate content.
11. Utilizing SFPUC’s custom PowerShell scripts and/or DocAve tool, implement developed governance practices around formal content, collaboration content, and records management.
12. Roll-out of Records Management utilizing SFPUC’s RecordPoint licenses, developing site templates with consistent document libraries, meta-data, content types and document sets so that end-users are not required to define more that 3 to 5 meta-data values.
13. Implement sync capabilities with SFPUC’s ArcGIS Collector cloud.
14. Convert custom InfoPath and list forms into PowerApps forms.

## Mandatory Minimum Qualifications

Proposer must submit the resumes of key persons working on this project. The resumes must clearly substantiate that Proposer’s resource(s) meet the Minimum Qualifications specified below, either individually or as a team. ***SFPUC shall reject any proposal with resource(s) that do not meet each Minimum Qualification identified below.***

1. **SharePoint Online (O365) Rollout Experience:**
	* Demonstrated business analysis and oral and written communication skills.
	* Verifiable prior experience successfully rolling out SharePoint Online to 3 or more business entities or government agency with 2,000+ employees.
	* Demonstrated knowledge of comprehensive SharePoint Online capabilities.
	* Verifiable prior experience of successfully deploying Records Management using Record365 and SharePoint Online (preferably within a utility agency).
2. **SharePoint Development:**
	* Demonstrated experience with designing and building prototypes, wire frames, visual interfaces and translating them into effective SharePoint solution/sites.
	* Demonstrated experience with design, development, and implementation of corporate portals, information management, and employee-facing intranet and extranet portals.
	* Demonstrated experience with converting Infopath forms into PowerApps forms.
	* Demonstrated experience with implementing integration with ArcGIS Collector, and Survey 123.
	* Minimum three years’ experience with design, development, and implementation of SharePoint 2016 and SharePoint Online solutions using client-side object model (CSOM), JSON, JavaScript, JQuery (or related libraries), CSS3, HTML5; and server-side technologies with web parts, event handlers, workflows, and SharePoint/ Office object models.
3. **SharePoint Configuration:**
	* A minimum of two years of SharePoint Online configuration experience.
	* Demonstrated two years of experience in SharePoint branding, CSS, and HTML.
4. **SharePoint Records Management:**
	* Deployment of SharePoint based records management for a business entity or government agency with 2,000+ employees a minimum of two times.
	* Demonstrated experience and knowledge of custom columns, custom lists, content types, document sets, meta-data, views, and forms with multi-step linear or parallel workflows.
5. **SharePoint Administration:**
	* Demonstrated experience with complex farm configurations and writing complex PowerShell scripts to deploy or retract features from SharePoint 2016 and SharePoint Online.
	* Demonstrated experience working with O365 and hybrid farms.
	* Demonstrated troubleshooting experience with browsers/office/servers.
	* Demonstrated large scale enterprise scale environment experience (2,000+ seats).
	* Demonstrated intranet and extranet experience.

## Proposal Evaluation

Each proposal received will be evaluated in accordance with the criteria below out of a total of 125 possible points.

### Resource(S) PORTFOLIO (70 Points)

* + 1. Only proposals that meet the Minimum Qualification listed in Section 2 will be evaluated under this section.
		2. Proposer must provide descriptions of *two completed projects* by its resource(s) describing and demonstrating how the Proposer’s resource(s) meet each Minimum Qualifications listed in Section 2. Each project will be scored as follows:
	+ SharePoint Rollout Experience: 10 points (5 points/per project)
	+ SharePoint Development: 30 points (15 points/per project)
	+ SharePoint Configuration: 10 points (5 points/per project)
	+ SharePoint Records Management: 10 points (5 points/per project)
	+ SharePoint Administration: 10 points (5 points/per project)
		1. The above evaluations may be predicated in part on formal interviews of the Proposer’s resources.
		2. Any proposal that does not submit a complete response to this section shall be deemed non-responsive and rejected.

### Scope of Work (35 Points)

* + 1. Only proposals that meet the Minimum Qualification listed in Section 2 will be evaluated under this section.
		2. Proposers must submit a detailed Scope of Work that provides its approach, deliverables and activities for each of the following items which shall be clearly identified in the Scope of Work by the general categories used below:
1. User Experience Improvements (10 points)
2. RecordPoint / Records Management Rollout Support (10 points)
3. Governance Planning and Execution (10 points)
4. As-Needed SharePoint Support (5 points)
	* 1. The above evaluations may be predicated in part on formal interviews at SFPUC’s sole and absolute discretion of the Proposer’s resources.
		2. Any proposal that does not submit a complete response to this section shall be deemed non-responsive and rejected.

### Staffing Plan and PRICING (20 Points)

* + 1. Technology Marketplace vendor must submit a quote for professional services and travel expenses (if applicable) as per CONUS guidelines using OCA’s Quote Form 3. In addition, Proposers must provide a spreadsheet listing each individual assigned to this project. For each individual, Proposers must identify the individuals’ name, title, role, hourly rate, and total approximate hours assigned to this project. Please note that SFPUC will be responsible for providing project management.
		2. SFPUC expects services for this project to be provided on an as-needed time and material basis for up to approximately 4,000 hours, both on-site and off-site. **SFPUC shall not pay any single hourly rate in excess of $180/hour (inclusive of all mark-ups) and an overall average hourly rate in excess of $160/hour (inclusive of all mark-ups). Mark-ups by Technology Marketplace vendors shall not exceed 5%.**
		3. Proposal that meet minimum vendor qualifications will be evaluated by their weighted average hourly rate across all tasks for this project. A maximum of 20 points will be attributed to the responsive bidder with the lowest average hourly rate. The total points assigned to each subsequent responsive bidder will be 20 points reduced by the total percentage by which that bid exceeds the lowest responsive bidder.
		4. Any proposal that does not submit a complete response to this section shall be deemed non-responsive and rejected.

## Other Terms and Conditions

* 1. There is no guarantee of a minimum amount of work or compensation for any selected proposal.
	2. SFPUC reserves the right to accept a proposal that is not the lowest priced proposal and/or to reject any or all proposals.
	3. SFPUC, in its sole discretion, has the right to approve or disapprove any consultant assigned to the project before and throughout the contract term.
	4. SFPUC reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables.