



Expanding Opportunities Worldwide

REQUEST FOR PROPOSAL: BIDDER QUESTIONS & ANSWERS

SharePoint Services

(RFP No. August-2018-Knowledge-Management-01)

1. **Can you please clarify what you mean by a “template for Projects Landing Page” and templates for project sites. Are you looking to create a repeatable site structure for each new project? Or are you looking for a page template that would be used when creating a new page? (I have the same general question about the department site as well.)**

Yes, we are looking for a reusable template that can be used when we provision a new project site as well as a departmental site. This will become clearer when we review the sites with your team.

2. **Are you currently sharing content types or other metadata in the site hierarchies in your current site collections?**

We are not currently utilizing content types. Some document libraries are utilizing metadata, but our intention is to use this engagement to discuss options for taxonomy and better understand how we could develop term sets for aggregation and to improve search.

3. **Can you please provide clarification regarding your outcome goals for modern pages and web parts? By “communications,” do you mean the News web part or are you referring to the new communication site template?**

We are currently on the classic experience and would like to use this engagement to transition to the modern experience for the improved UI and additional functionality that comes from new features and functionalities that we can make use of to meet our business needs. We are open to using communications, hub, or team sites. We’re just looking for the best option for our organization.

4. **Can you please share your budget or budget range for this project?**

The bidder should propose their costs for services suggested. ACDI/VOCA will select the best value offer.

5. **What O365 License is the majority, if not all, of the 1000 users assigned in O365 (for example E3)?**

We have about 140 E5 users and the balance, roughly 860, are mostly E3.

6. **What, if any, third party tools do you have licensed and/or use with O365 and SharePoint Online in particular?**

We use AvePoint for backup of SharePoint and OneDrive content and Command 365 for email account management.

7. **Are all features of your subscription turned on for all or the majority of the 1000 users? Specifically, Teams.**

Teams is turned on though sparsely used.

8. **Are Teams and Planner in use among the users?**

There are some users of Teams. In general, the lack of email notifications limits Team use. Most staff use Office 365 Groups. If there is a compelling reason to move to Teams that fits with staff work adoption, we would be interested in exploring that. There are some units using Planner, but it is not widely used. Again, with a compelling use case, adoption would pick up.

9. **How much of your SharePoint allocation is currently in use in O365?**

If you're referring to space, we exhausted our original allocation based on usage and are now purchasing additional storage monthly.

10. **You mention two site collections, in review of the provided information architecture diagrams, which are in which collection?**

When we moved to SharePoint, we started with one site collection. We've evolved into a new site collection, which is detailed in the attached IA. Just as a note, there are additional project sites under each country site, some of which have a SAMS or LEAP site. We used Bangladesh, Egypt, and Burkina Faso as example constructs. The old site collection is only occasionally used.

11. **For almost every engagement on which I work, either on my own or with a partner, we come to the table with a collection of programs, systems, software, data, tools, materials, and templates (collectively "Utilities") which are our proprietary information and intellectual property. These Utilities allow us to accelerate every project forward. We would typically provide a perpetual, irrevocable, royalty-free license to use any such Utilities incorporated into the works of authorship specifically developed for our clients for their internal purposes. This does not, however, grant the right to sell, copy or publish this work as described in Section 12 of Appendix A. If what is stated is a requirement of the engagement, we would be unable to use these Utilities – which would likely increase the cost of the engagement significantly and deprive ACDI/VOCA of benefitting from these proven Utilities and approaches. Can you please clarify your expectations and flexibility in this regard?**

We have verified that issuance of a perpetual, irrevocable, royalty-free license for the Utilities would be a suitable solution.

12. **You are referencing SAMS and LEAP sites, and JaREEACH II as an example of project-specific site. Could you please provide information about these sites? We didn't find any description in the RFP.**

Like many of the project sites, the JaREEACH II site is a basic team site that has text, web parts (some of which are not used), a document library with several folders, and a few other left navigation items that link to pages. A LEAP site includes document libraries, staff photos, data

visualizations, and a link to an Access database. A SAMS site has text, document libraries, pages, and database statistics.

13. Do you currently use Publishing SharePoint features?

No.

14. Do you have any 3d party solutions on the sites? Which ones? Do you plan to upgrade/migrate them as well?

No.

15. Do you have any implemented customizations on the site, such as custom master pages, page layouts, custom JavaScript, etc.?

No.

16. How “deep” are your brand guidelines? Do they include just basic colors or layout guides, font guides?

We would want to use our color palette. We are open to discussing font based on your recommendations.

17. How “vanilla” in terms of UI and design do you want to go after the upgrade? Do you want to have custom layouts for the pages or use out-of-the-box layouts?

We are open.

18. Are there any concerns or restrictions on using open-source solutions (PnP provisioning, PnP Starter Kit, open source modern web parts and extensions)?

No.

19. Do you consider purchasing “Intranet in a box” solutions if needed, such as Valo or Powell 365?

We would consider it.

20. Do you consider buying 3d party solutions (web parts, extensions) if needed?

Yes.

21. You ask to recommend better site architecture and navigational structure. Do you have specific requirements if any parts of your current structure should remain without changes?

We are open.

22. Do you currently have any taxonomy/term sets of want to build the taxonomy from scratch?

From scratch.

23. Do you have Azure Subscription with App Service plan and Azure Functions available?

Yes.

24. Do you use different permissions for different sites/subsites? Do you have security trimming in the navigation based on these permissions?

We do use different permissions for different sites and subsites. We use security groups that are established in active directory to manage access permissions.

25. On the Technical Proposal Submission Sheet, we noted that for the Type of Business/Institution has only 2 options: Non US owned/Operated and Government owned. There is no option for US Owned/Operated for a small business to check. What do you recommend organizations who are US Owned/Operated and are a small business do for this section? Additionally, I assume for US owned and operated companies, that would omit the Anti-Terrorism Certification section? Is this correct?

Write it in ☺. We verify that whether the consultant or firm is on a terrorism watch list regardless of its US-owned and operated.

26. The Business Registration Number at the bottom of the page, is that our Federal ID # or the state registration number?

Tax ID number.

27. Under section IV. Proposal Preparation and Submission Instructions, Concept Note: It is confusing as to the expectation in the Concept Note due Sept 7 because it does not match the preceding section in the Instructions for Concept Note Preparation. Can you confirm that the required information in the Concept Note are A&B and once chosen, the RFP Response would need to include C,D, and E?

The concept note should include A & B. Sorry for the confusion.

28. We have a couple of necessary adjustments to the Terms and Conditions, when would our edited copy be due to you for your review?

If the vendor is selected for award, our Award Management group will connect on this.

29. Do you have the ability to purchase under the GSA IT Schedule 70, because associated terms and conditions would prevail.

If the vendor is selected for award, we can consider purchasing through that mechanism.

30. Are you interested in solutions that incorporate additional O365 services such as Teams, Flow, Power Apps, Power BI, etc?

Yes.

31. Are there any Non-Functional requirements for the target application?

None at this time.

32. What all third-party integrations should we consider while preparing the concept note?

Vendors are free to propose third-party packages that make sense.

33. Will the scope of work also consider Data Migration from existing applications to the target application?

There are no data migration plans. We are planning to migrate document libraries from the old site collection to the new site collection. Please see RFP for additional insight.

34. Is it possible to have a demo of the existing applications to understand the work better and suggest accordingly?

Please see RFP.

35. IS there a need for a Dynamic DIY (Do it Yourself) template where the user can configure widgets or create their own templates based on their need?

PowerBI is our corporate data visualization tool and will be deployed on SharePoint pages as it makes sense.

36. Is there a need for multi lingual support?

Not at this time.

37. How is current SharePoint instance deployed?

Please see part B of the introduction in the RFP.

38. What is the current SharePoint version ACDI/VOCA is using?

SharePoint Online 2013

39. Are you planning for an extranet or keep the deployment as intranet?

Intranet only.

40. Are there any key elements about your knowledge management platform – integrations with internal or external applications or portals?

No.

41. Are you looking for rebranding or web content management (CMS) as part of new SharePoint initiative, both - at the top level, at the site level?

Please see RFP.

42. What are the essential elements under migration – Sites, Users, Data size, Content Types, Documents etc.? Are you open to adopt a migration tool as needed?

Sure.

43. **Are there any customizations at Site, Library(s), lists, Custom pages etc. currently? Customizations like – Branding, custom controls, custom web parts, external plugins or web parts etc.?**

No.

44. **Is there any kind of automated or manual Workflow included as part of the process for the Project Management sites(s)? Inclusive Market Systems, Resilience & Growth, Project Operations, Project Startup, and Project Closeout**

One site collection contains simple out-of-the-box workflows based on SharePoint lists.

45. **Who are essentially the users of every project site? Internal users, external users, vendors?**

All internal users can use project sites and some external users have been given access to project sites with Microsoft Live IDs.

46. **Are there any specific and different site templates currently being used for these project sites?**

We have one template that we've used for project sites, but are looking to evolve the template.

47. **How many project Templates are being currently used?**

See above.

48. **Will there be different templates required – how many? (By different templates – we mean, different set of web parts, information, structure of the site)**

At a minimum, we are looking for a new landing page template, a new department template, and a new project template.

49. **Are there identified Term Sets and Taxonomies or will this be part of discovery?**

Please see RFP.

50. **Is the search scope to be limited to SharePoint farm(s) only?**

This is a SharePoint Online environment.

51. **Is it okay to say that ACDI/VOCA SharePoint users will be Windows Active directory authenticated users? OR there is an alternate user authentication layer?**

Windows Azure Active Directory.

52. **Is there integration with Office 365? – Office, Exchange etc.?**

Yes.

53. **Are any External Systems Integrations with the envisaged Website (Web Services Call)?**

No.

54. Do you have any existing branding guidelines to be followed while designing the mock-ups, wireframes and illustrations?

Yes; they will be provided to the consultant or firm upon award.

55. Are there any disability requirements in scope of this project?

No.

56. Have any workshops, discovery or requirements gathering sessions in the creation of this RFP request taken place and have they been documented? If so, can you provide any additional notes, documentation, architectural diagrams resulting from all activities preparing for this RFP?

At this moment, we believe that the RFP is all that prospective bidders need to complete the concept note and proposal.

57. Will this system be replacing any Custom Built Apps? Or will it link to those apps?

No.

58. How many environments will the vendor have to implement?

It's just one Microsoft SharePoint online "farm." We anticipate multiple site collections in our online environment.

59. Is ACDI/VOCA supporting O365 as Dedicated or Multi-Tenant?

ACDI/VOCA has a dedicated Office 365 tenancy.

60. Is ACDI/VOCA using Microsoft AZURE or desire to use in their future strategy to support their current intranet?

We're on Azure.

61. Please provide examples of reports being produced or compiled and displayed in the usage and management of the intranet?

We do not generate any reports, but would like to look into a Google Analytics integration with SharePoint Online.

62. What feeds or services are currently required to move into the new site?

There is an RSS feed that pulls news content from our external website that we would like to keep.

63. From how many locations the Portal will be accessed from?

It will be accessed by our global staff in 25 countries.

64. Will content be authored from multiple locations in multiple languages? (Multi-lingual content) If so, which all languages should we consider in our scope of work?

English.

65. Please list all applications and version of software that are being used today to produce documents which are being utilized and any anticipated future applications to be used to produce these documents in the future

Office Professional 2016, Adobe Acrobat, and DocuSign.

66. Could you please elaborate on the number of external users, their locations and various sections that they will be able to access?

A handful of project sites have external users who authenticate with Microsoft Live IDs.

67. Following Non Functional requirements:

Intranet Security requirements (e.g. HTTPS connection, need to encrypt/decrypt data, etc.)

Audit (Business elements that needs to be audited)

System Performance:

- Expected Response Time

- Processing time expected for Functionalities, Import, Export, Document upload/download, etc.

Throughput (transactions per hour does the system need to be able to handle)

Capacity (Total number of users, concurrent users expected now and in near future)

System availability

Data Archival (The limit after which data in key tables should be archived)

There are no current non-functional requirements in this regard.

68. It is mentioned that the solution is expected to support "Improve search functionality using tags and taxonomy that serves universal searches as well as departmental searches.". Please provide more details on these relevant systems / Is the Intranet portal expected to display search results from external systems?

No. Tagging of documents will help improve more accurate search results.

69. Is there a list of file formats that will stored within the document management system and portal? Any obsolete or unusual formats?

No; mostly .docx files and .pdf.

70. **What is the current Authentication protocol? Does it use multi-factored authentication?**

Azure Active Directory Services and no multi-factored authentication at the time.