



Request for Proposal RFP #2017-05-25 SharePoint Online

I. STATEMENT OF PURPOSE

South Carolina Legal Services (SCLS) is currently accepting proposals from qualified vendors with demonstrated knowledge and experience in SharePoint Online to design, develop, and implement a secure, enterprise-level information management platform using SharePoint Online. In an effort to improve and enhance collaboration, document management, and business processes, SCLS has determined that a cloud-based platform would better address and resolve our needs for a more streamlined, automated, and efficient business process system.

The purpose of this Request for Proposal (RFP) is to: (a) solicit proposals from qualified vendors, Contractors, companies, (herein after "Contractor"), that meet the requirements set forth in this RFP; (b) conduct a fair evaluation process based on criteria listed herein; and, (c) select the most qualified vendor who represents an understanding of SCLS' needs and the direction SCLS wishes to go.

II. ORGANIZATIONAL BACKGROUND

SCLS is a 501(c) (3) non-profit statewide law firm that provides free legal services in a wide variety of civil (non-criminal) legal matters to eligible low income residents of South Carolina. SCLS is funded by grants from the Legal Services Corporation, the South Carolina Bar Foundation, local United Ways, state court filing fees, and other federal, state and local funding. Total number of persons employed by SCLS is approximately 120, with ten (10) offices located around the state, one being our statewide Intake Office. For more information about SCLS, please visit our website at: <http://www.sclegal.org>

NETWORK INFRASTRUCTURE

SCLS' ten (10) offices are connected via a wide area network (WAN) and is configured on an MPLS platform. SCLS' infrastructure is powered by a fiber network for voice/data. SCLS uses a premised based VOIP phone system, using Asterisk PBX built on the Linux platform.

III. PROJECT PURPOSE:

The purpose of this project is to improve SCLS' overall business processes of document management, collaboration, storage, and workflows. SCLS' current processes of document storage and management, collaboration, and overall business processes are inefficient, cumbersome, and somewhat unorganized.

The implementation of SharePoint Online a cloud-based, collaborative platform will also enhance and improve the effectiveness and efficiency of client services delivery.

Years ago, SCLS made the strategic decision to become a more efficient/effective law firm by reducing our 'paper' footprint and cost of onsite document storage by adopting various paperless processes. Initially, SCLS began utilizing virtual storage and backup and soon realized that in order to provide a more effective and efficient delivery of client services, we had to embrace the latest cloud-based technologies that store, manage, organize, collaborate, and automate processes.

IV. PROJECT DESCRIPTION:

SCLS is seeking a Contractor to utilize the cloud-based SharePoint Online platform via Office 365 to design, develop, and implement a secure, enterprise-level information management Intranet as an online solution to store, manage, organize content, collaborate, and automate processes. SCLS' intranet should be useful, usable, provide the information and tools that employees need, and assure that information is quick and easy to find by incorporating taxonomy and metadata to maximize "search-ability".

The successful implementation of SharePoint Online and SCLS' Intranet will improve collaboration, business communication, document management and sharing. SCLS' new intranet will also assist us in accomplishing broader organizational goals going forward by designing a dynamic system architecture that will enable SCLS to continue its growth of streamlining and automating business processes that will ultimately deliver visible and measurable business benefits.

V. PROJECT SCOPE:

This scope of this project consists of three primary phases that include planning, designing, developing, testing, and implementing SCLS' SharePoint Online intranet with a *limited deployment. The selected Contractor will be responsible for all deliverables included in the three (3) phases outlined below. The following actions, tasks, and deliverables must be met to achieve a successful project:

PHASE ONE - Discovery, Assessment, Requirements Gathering, and Analysis and Define:

1. SCLS will officially launch the SharePoint Online Implementation Project;
2. SCLS' Project team (hereafter "team") will educate Contractor on SCLS' mission, vision, goals, and organizational structure;
3. Contractor will present a SharePoint Online demo and discuss project goals and objectives with the team;
4. From the perspective of a subject matter expert on SharePoint Online, Contractor will outline the steps necessary to plan, design, develop, deploy, test, and implement an Intranet using SharePoint Online 2016 based upon the project's goals and objectives;
5. Contractor will document and maintain technical documentation throughout all phases of the project.

PHASE TWO - Plan, Design, Develop, Review, Deploy SharePoint Online via Microsoft Office 365 and Test.

1. Contractor will develop a Project Plan to include project timeline, milestones, activities and deliverables;
2. SCLS will provide Contractor with Microsoft Office 365 licenses to deploy SharePoint Online;
3. SCLS' technical staff will provide vendor DNS configuration, etc. for deployment and implementation purposes;
4. Contractor will plan, design, develop, deploy and implement a SharePoint 2016 Online Information Management Platform via Office 365;
5. Contractor will design, develop and deploy SCLS' Information Architecture using information collected during requirements gathering;
6. Contractor will design, develop and deploy SCLS' Home Page;
7. Contractor will design and develop an "Employee Resources" Site.

PHASE THREE - Deployment, Implementation, Metadata/Taxonomy, Migration, Testing and Training.

1. Contractor will deploy SCLS' "Employee Resources" Site;
2. Team will provide to Contractor a copy of SCLS' Employee Resources documents for migration;
3. Team will create, document and develop a Metadata/taxonomy system for tagging Employee Resources documents for search-ability;
4. Team, along with Contractor, will inventory, categorize and tag Employee Resources documents for migration, (data discovery, data analysis, data classification);
5. Contractor will migrate tagged Employee Resources documents to online "Employee Resources" site via document portal, based on approved metadata system;
6. Contractor will provide user training for team on the use of the deployed SharePoint Online functionality and capabilities;
7. Contractor will provide site administrator training for SCLS' site administrators;
8. Contractor will create a User Guide.

VI. DELIVERABLES:

	<u>Deliverable</u>	<u>Description</u>	<u>Responsible Party</u>
1.	Project Initiation	<p>Initial meeting of project team -</p> <ul style="list-style-type: none"> • Orient SCLS' Project Team on the project, i.e. - review expectations, collect and validate business needs/requirements, explore, clarify and agree on any alternative feature/function. • Participate in question/answer session. • Present demo of SharePoint Online capabilities and an example of Contractor's completed work product. 	Contractor
2.	Project Plan	<ul style="list-style-type: none"> • A project schedule including tasks, resources, timelines, and milestones to complete the project. 	Contractor
3.	Outcomes	The specific deliverables from the contract depend on the tasks proposed for this project. Potential deliverables include strategies, assessments, or planning-related documents.	Contractor
4.	Business Requirements/Documentation	<ul style="list-style-type: none"> • Gather requirements to support the planning and design activities necessary for the project. • Document the results from the requirements gathering task for evaluation and implementation of SharePoint Online. This includes SCLS' business needs and requirements, i.e. outlining Requirements/Solution Capability Alignment. 	Contractor
5.	Information Architecture	<ul style="list-style-type: none"> • Develop the scalable Information Architecture that will support the needs of SCLS, using the information collected during requirements gathering. 	Contractor
6.	Design/Development	<ul style="list-style-type: none"> • Design an Information Architecture for SCLS' SharePoint Online Intranet. • Design SCLS' Intranet Home Page and 	Contractor

		<p>present to team the Initial Design Concepts and Ideas, incorporating SCLS' specific customization(s), if applicable.</p> <ul style="list-style-type: none"> • Design and develop "Employee Resources" site. 	
7.	Deployment Plan/Deployment	<ul style="list-style-type: none"> • Develop a deployment plan for Phases 2 and 3 incorporating the information collected from the requirements gathering, business requirements, design tasks, and information from SCLS' <u>limited deployment</u> site ("Employee Resources"). The plan should include a schedule, key tasks and milestones, high-level goals, and objectives for a <u>limited</u> deployment phase, at a minimum. • Deploy and implement a SharePoint 2016 Online Information Management Platform via Office 365. • Deploy SCLS' "Employee Resources" site. 	Contractor
8.	Metadata/Taxonomy	<ul style="list-style-type: none"> • Create, develop, and document a Metadata/taxonomy system for tagging the Employee Resources documents for search-ability. • Inventory, categorize, and tag the Employee Resources documents for migration (data discovery, data analysis, data classification). 	Team
9.	Implementation Plan/Implementation	<ul style="list-style-type: none"> • An implementation plan, including specific dates, tasks, and milestones for SCLS' project team. • Implement SCLS' Intranet Home Page, (including features for portal level sites, etc.), that support SCLS' needs for the current phases, as well as future phases. 	Contractor

		<ul style="list-style-type: none"> • Implement Metadata/taxonomy system and document portal with document management functionality, i.e. such as: versioning, sharing and libraries. 	
10.	Migration Plan/Migration/Documentation	<ul style="list-style-type: none"> • A Migration plan for SCLS' <u>limited migration site</u>, "Employee Resources" • Migrate Employee Resources documents. • Documentation of Migration process. 	Contractor
11.	Testing Plan/Testing/Documentation	<ul style="list-style-type: none"> • A Testing plan, including protocols for each phase. • Test and document the results of each phase of development, implementation, deployment and migration. 	Contractor
12.	Training and User Guide	<p>A training plan, including specific milestones for SCLS' project team.</p> <p>A User Guide for SCLS' SharePoint Online that covers the functionality implemented for SCLS' Intranet, i.e., connecting to SharePoint Online, accessing documents and performing document searches.</p>	Contractor

VII. TIMELINE FOR PROJECT

Contractor activities and deliverables will commence on June 21, 2017.

VIII. RFP INSTRUCTIONS TO CONTRACTOR

A. PROPOSAL GUIDELINES:

This RFP represents the requirements for an open and competitive process. Proposals will be accepted until **4:00 pm EST, June 9, 2017**. Any proposals received after this date and time will not be accepted. All proposals must be signed by an official representative of the company submitting the proposal. All costs included in the proposal must be itemized to include an explanation of all fees and costs. Contract terms and conditions will be negotiated upon selection of the winning bidder for this RFP. All contractual terms and conditions will be subject to review by SCLS' General Counsel and will include scope, budget, schedule, and other necessary items pertaining to this project.

Upon release of this RFP, all Contractor communications concerning this project must be in **electronic format only** and directed to SCLS' Information Technology Manager:

Pat Muller, M.I.S.
Information Technology Manager
South Carolina Legal Services
patmuller@sclegal.org

The Information Technology Manager ("I.T. Manager") is the sole point of contact concerning this RFP. Only published statements issued by SCLS' Information Technology Manager may be relied upon.

B. RFP SCHEDULE:

Date	Event
May 25, 2017	RFP Published on www.sclegal.org
June 2, 2017	Contractor RFP Questions Due by 4:00 pm EST
June 7, 2017	Responses to RFP Questions posted on sclegal.org by 4:00 pm EST
June 9, 2017	Contractor Responses to RFP Due by 4:00 pm EST
June 12–13, 2017	Evaluation Process and Selection of Contractor
June 14, 2017	Successful Contractor announced by 4:00 pm EST
June 15 -20, 2017	Negotiation of Contract, Contract Awarded

Contractor may view and download this SharePoint Online RFP document on SCLS' website at:

<http://www.sclegal.org/Home/RequestForBids/tabid/2442/language/en-US/Default.aspx>

C. CONTRACTOR QUESTIONS:

Contractor may request clarification to this RFP only by submitting a written request via email to the I.T. Manager. SCLS will only provide answers in the form of a written addendum to this RFP. All questions must be received via email no later than **4:00 EST on June 2, 2017**. Any Contractor who wishes their proposal response to be considered is responsible for making certain that their response is received by the deadline.

D. RESPONSE FORMAT:

The proposal must be sent electronically via email in .pdf format to SCLS' Information Technology Manager, Pat Muller – via email address noted above in Section VIII (A). The Email subject line should read: SCLS RFP #2017-05-25.

E. RESPONSE REQUIREMENTS AND CONTENT:

Contractor must respond to each question and requirement in Exhibit A (attached). In preparing their responses, Contractor should restate each requirement and then provide their response.

F. RESPONSE DATE AND RECEIPT:

The Contractor's response, in its entirety, must be received by SCLS' Information Technology Manager in accordance with the schedule outlined in Section VIII, Item B above. Late proposals will not be accepted and will be disqualified from consideration. Contractor assumes the risk for any email delay problems.

G. COST OF PREPARING RESPONSES:

SCLS will not pay any Contractor costs associated with preparing responses that are submitted in response to this RFP.

H. RESPONSES PROPERTY OF SCLS:

All responses, accompanying documentation, and other materials submitted in response to this RFP shall become the property of SCLS and will not be returned.

I. PROPRIETARY INFORMATION AND PUBLIC DISCLOSURE:

All responses received shall remain confidential until the Contractor is selected. Thereafter, responses shall be deemed public record.

J. RFP AMENDMENTS, CANCELLATION, REISSUE, REOPEN:

SCLS reserves the right to change the RFP schedule or issue amendments to this RFP at any time. SCLS also reserves the right to cancel or reissue the RFP.

K. ADMINISTRATIVE IRREGULARITIES:

SCLS reserves the right to waive minor administrative irregularities contained in any response.

L. NO OBLIGATION TO ENTER INTO A CONTRACT:

The release of this RFP does not compel SCLS to enter into any contract. SCLS reserves the right to refrain from contracting with any Contractor that has responded to this RFP whether or not the Contractor's response has been evaluated and whether or not the Contractor has been determined to be qualified. Exercise of this reserved right does not affect SCLS' right to contract with any other Contractor. SCLS reserves the right to request an interview with any Contractor and/or a demonstration from any Contractor prior to entering into a contract with that Contractor. If a Contractor declines the request for an interview or demonstration for any reason, the Contractor may be eliminated from further consideration. SCLS reserves the right to enter into contracts with more than one Contractor as a result of this RFP.

M. NON-ENDORSEMENT

The selection of a Contractor pursuant to this RFP does not constitute an endorsement of the Contractor's services. The Contractor agrees to make no reference to SCLS in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of SCLS.

N. RFP EVALUATION:

The evaluation of the RFP responses will be done by SCLS' evaluation committee. SCLS may consider reference checks beyond those listed in the Contractor responses. As part of the proposal evaluation process and at the discretion of the evaluation committee, a Contractor may be asked to clarify specific points in their response. Under no circumstances, however, will a Contractor be allowed to make changes to their responses.

Evaluation Criteria	Maximum Points Possible
Background & Experience	20
SharePoint 2016 and SharePoint Online Design/Development/Implementation Experience and Skills	25
Demonstration of an understanding of the project's requirements as outlined in RFP	20
Cost Proposal	20
References	15

O. POST EVALUATION:

The Contractor selected to provide the services outlined for this project will be expected to enter into a contract with SCLS. A Contractor whose responses have not been selected for further negotiations or award will be notified via email.

IX. PAYMENT

Contractor will invoice SCLS for 10% of total cost of project, as specified in contract, at project commencement and thereafter as follows:

- (a) 20% upon successfully completing Deliverables 4, 5, and 6, as referenced in the Project Scope, Section V and Deliverables, Section VI above.
- (b) 40% upon successful completion of Deliverables 7, 9, and 10, as referenced in the Project Scope, Section V and Deliverables, Section VI above.
- (c) 30% after remaining tasks and deliverables are successfully completed, as referenced in the Project Scope, Section V and Deliverables, Section VI above.