QUESTIONS & RESPONSES #01
RFP / TITLE: 071656 Records Management In MS365
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#	Question	Answer	Question #
1	From the Scope of Services: The purpose this Request for Proposals (RFP) is to select a Microsoft certified firm to assist the PORT in establishing MS365/SharePoint as our primary Records Management platform. The intended solution, MS365 Purview should be able to manage, categorize, retain, and dispose of electronic records in a way that ensures information integrity, compliance with legal and regulatory requirements, and optimized access for stakeholders. The selected consultant will need to have experience in these areas. - I wanted to confirm the decision has been made that the Port will use Purview for the RM solution, and therefore a response using a different tool would be rejected.	The decision has been made to for Port of Tacoma to use Microsoft Purview to support our Records Management. The Port is not looking to explore other tools at this time.	Email
2	C. SCOPE OF SERVICES The purpose this Request for Proposals (RFP) is to select a Microsoft certified firm to assist the PORT in establishing MS365/SharePoint as our primary Records Management platform. The intended solution, MS365 Purview should be able to manage, categorize, retain, and dispose of electronic records in a way that ensures information integrity, compliance with legal and regulatory requirements, and optimized access for stakeholders. The selected consultant will need to have experience in these areas. Q1 - Has the Port established a records plan/file plan identifying all record types and retention/disposition schedules. Q2 - Clarifying – are there any physical records included in the scope? Q3 - Is there any emails, network shares, other content included in the scope or is the RFP based electronic records in SharePoint ? Q4 - What type of M365 licensing does the port own? Q5- Has the Port participated in an analysis engagement around Purview/Records Management in M365 with an existing/other vendor prior to this RFP being released ?	Q1: No, file plan/records plan has not been established. We are looking for a consulting firm to assist with information articheture and set up SharePoint based on retention/disposition schedule. Q2: For this scope of work, no physical records are included. Q3: As part of the scope, the Port will be migrating data from a legacy system, Kofax PSIsafe. (See section B of RFP). Q4: See Section B of RFP. Q5: Port staff have internally evaluated/ assessed the capabilities of Purview/Records Management in M365 and consulted material provided by Washington State Archives Website (Managing State Agency Records - Washington State Archives - WA Secretary of State). Outside of that there has been no analysis engagement with an existing/other vendor.	Email
3	D. DELIVERABLES Deliverables will vary by Task Order, but may include activities in the following categories: - (Deliverables may vary by Task Order) is the port anticipating a different description of deliverables in Attachment D compared to the Scope of Services section ? This question is related to consistency with the scope of services and deliverables.	The question is unclear.	Email
4	Discovery and Assessment of solution and its ability to handle all record types. Q1 - Can the port share how many record types/" labels" there are in the records/file plan? Q2 - Is it a flat records/file plan or is their hierarchy (nested branches)?	Q1: We have yet to develop the file plan. See question #2. Q2: We have yet to develop the file plan. See question #2.	Email
5	Implementation & Configuration of the solution: Q1 - Are the Port's system administrators/support staff planning to participate in standing up the records center and Purview? If so, in what capacity? Q2 - Is the Port envisioning a Records Center site collection to manage all content via Purview?	Q1 - Yes, Port staff will be participating with the selected vendor in building, configuring, and testing all aspects of Purview. Q2 - We intend to do record retention in-place or a hybrid approach were records are held in place. After consulting with the selected vendor and it is determined a centralized location for archival records is needed then we will consider that option	Email

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6	Integration of the solution with any other solution to assist in managing all record types. - Can the Port share what other types of solutions Purview would be integrated with ? Would "any other solution" be considered outside of M365?	We would like to use MS365 where possible. If we determine we have requiremeents that cannot be met with MS365, then we will consider integration with tools outside of MS365.	**Email**
7	Training & Adoption of the solution, configuration including supporting documentation, training users and training materials. Q1 - Would the respondent be providing train the trainer or direct training sessions to individual groups (Administrators and end users)? Q2 - Supporting documentation – this would be as-built documentation of the Records Center ?. Q3 - Have the end users had any previous exposure to a SharePoint in general and/or Records Center ? Q4 - Have the System Admins had any previous exposure to Records Center/ M365 Purview or Compliance tools ? Q5 - Do the end users, Records managers, have experience with any other Records Management platforms ? Q6 - Are there any specific branding expectations for the Records Center home page ? Custom ? Q7 - Is there a change management team that will help drive the change management and adoption?	Q1: Train the project team and adminstrator. Q2: Administration and configuration of documentation. Q3: End users have exposure using SharePoint, but not Records Center. Q4: The system admin has minimal exposure with implementing retention in the record center in MS365. However, the system admin has knowledge of how it fundmentally functions. Q5: OpenText Q6: At this time, no there is no expectation for customization of a records home page. Q7: The Port will rely on the Records & Information Management project team & selected consulting firm to drive change mangement.	**Email**
8	Testing, Quality and User Acceptance Testing: Q1 - Will the Port team be participating in testing, QC and UAT sessions? Q2 - Will the participants be able to perform the role of various required actors?	Q1: The consulting firm will work along side the Records & Information Managment project team that is made up of: IT Project Manager, Records Manager, & IT Tech Lead. Q2: The project team will be active participants of testing and UAT. The business will also be active participants.	**Email**
9	Ongoing Support & Maintenance: Q1 - Will the Port permit the respondent to provide an addendum to the RFP clarifying their understanding of the deliverables ? example, hours per deliverable item in the scope ? Specific details in the deliverables ? Q2 - Invoicing – this is labeled as a fixed bid, not to exceed. Attachment D notes hours. Is the Port anticipating invoices by utilized hours each month ?	Q1: Yes,, please include in Attachment C, Cost Breakdown. Q2: Invoicing should be done monthly with the hourly rates using the hourly rates included in the proposal.	**Email**