QUESTIONS & RESPONSES #1

RFP or RFQ / TITLE	**RFP 071564 Training Support for Modern SharePoint Adoption & Records Management in Microsoft 365**
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#	PROPOSER QUESTIONS	PORT RESPONSES
1	Is the purpose of the "training project" to teach staff how to design and implement a modern records management system or is the purpose to teach employees how to use a strategy/system that has already been designed and approved by the organization?	The purpose of this RFP is to select a vendor to help teach our employees how to use Modern SharePoint and MS365 Records Management Capabilities.
2	Page 2 of the RFP states "providing training to transition from Classic SharePoint to Modern SharePoint, migrate network files to Modern SharePoint Libraries and implement Records Management Capabilities in Microsoft 365". This statement seems to imply that the Port of Tacoma is currently doing Records Management using Classic SharePoint. Please describe your current SharePoint implementation and the Records Management strategies that are currently in place. Including: • The number of sites, libraries, and documents. • The number of authenticated users using your current intranet (file share). • The number of authenticated users you expect for the new SharePoint environment. • Is the Port of Tacoma currently using content types and if so, how many? • Do the content types carry retention periods? • Is the Port of Tacoma using record centers with drop-off libraries to collect records during their retention periods. • Is the Port of Tacoma currently using E discovery and does the organization plan to in your modern implementation? • Has the Port of Tacoma adopted a philosophy of in-place records management versus centralized archiving?	The Port of Tacoma currently utlilizes Classic SharePoint, and in the process of implementing Modern SharePoint. We do not currently take advantage of MS365 Records Management Capabilities. We intend to introduce those capabilities in the coming year. We anticipate training 350 staff members on Modern SharePoint and Records Management Capabilities.
3	Under "deliverables", Bullet item 1 identifies "training plan, codeveloped with port project team". Does this refer to the development of a plan for the delivery of the training? Will this group also developing a plan for what the training will cover? Will this include developing and documenting the underlying strategy for how the organization utilizes MS365 to achieve state mandated records management compliance?	The training plan that we anticipate co-developing is: delivery of the training, and what the training will cover. The Port of Tacoma will be developing a Records Management strategy next year. The training plan will support that strategy.
4	Has the Port of Tacoma modern MS365 / SharePoint online intranet already been implemented? If so, what is its current state of adoption (#of users, sites, libraries)	No. N/A
5	Is the Port of Tacoma currently using MS Teams? If so, how many Teams currently exist?	Yes, we are currently utilizing Teams for calls, chat and online meetings only. Additional collaboration functionality will be rolled out once we implement Modern SharePoint.
6	Does the training curriculum need to include the legal requirements for the handling of email, chat messages through Teams, outside storage (Dropbox, Google docs) and social media posts?	Yes.
7	If so, has the organization documented these policy statements?	Some are documented, some are in progress.
8	Has the rollout and use of the MS365 platform (email, office, SharePoint, Teams, etc) been professionally architected?	Yes, and the architecture for MS Teams, Modern SharePoint and Records Management Capabilities is being developed.
9	Please confirm if the mode of training is On-site who will provide the student computer with office 365?	The Port will provide any student equipment needed for in-person or remote training. Any in-person training will be conducted at Port facilities in Tacoma, WA.
10	What will be the Location for On-site training, and who will provide the equipment related to the training?	See question 9
11	On page No. 03 of RFP documents '' Customized Training Materials in soft copy that that will belong to the Port for re-use.'', what kind of customized is required?	Customized training materials based on the specific SharePoint/MS365 enviornment and configuration at the Port and the common activities that our users will need to perform. The details of this will be worked out collaboratively between the selected training vendor and the Port.
12	What will be the minimum number of participants?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
13	Is there is an incumbent vendor?	No

14	On page No. 03 of RFP documents ''Recorded training sessions for on-demand use within the Port's training site'' Does the Port require pre-recorded sessions or E-learning subscription-based?	We would like some of the training sessions that are delivered to be recorded so we can make them available to Port staff from our SharePoint Training site for those users that are not able to attend the interactive training or would like a refresher on the information at a later time.
15	Is there is any percentage assign for MWBE participation? if yes, is this mandatory to be local MWBE?	No
16	Is this more of a one-time migration for SharePoint or are you also looking for managed services along with this?	This RFP is for training services only.
17	Will the Vendor responding to this RFP be barred from any future follow-on work related to migration or similar engagement?	No
18	Is there any incumbent vendor who has helped the Port in moving from classic SharePoint site to Modern SharePoint and Record Management implementation? If yes to the above, will that Vendor be bidding for this opportunity and given any preference over other vendors?	The Port has an existing SharePoint support vendor that is assisting with the migration. That vendor will be allowed to submit a proposal for this RFP but will not be given preferential treatment.
19	Is the proposed budget of $125,000-$150,000 provided in the RFP for the one-year contract duration? or does this budget also includes any optional renewal for additional two years?	$125,000-$150,000 is the anticipated range of training costs through December 2022. If the contract is extended then additional funds may be added.
20	Do we need to provide any Customer reference contact details in our proposal response, as from the "Initial Evaluation Phase" response questions (Page 4/5 of the RFP), it seems it is not needed? Please confirm.	We will request reference details from proposers if they are required. You do not need to include them with your initial proposal submittal.
21	If Customer reference contact details are required, how many references Vendor has to provide.	See question 20
22	Page 5 of the RFP in the 'Compensation' details, it asks that – 'Compensation information MUST be provided separately from the proposal, in an individual PDF document.' Since the proposal submission method is Hard Copy submittal ('One original (1), and three (3) copies of the response'), please confirm if the above statement is a typo, or can we submit our proposal response by email (to procurement@portoftacoma.com) as PDF in place of hard copy submission, please confirm.	Please include compensation details as a separate hard-copy document with your proposal submittal.
23	Is subcontracting with another vendor allowed under this RFP to provide a joint proposal?	Yes
24	Are there any non-training deliverables under this RFP, and if so, please specify?	All deliverables will be related to training and training-related communications to prepare our users for adopting Modern SharePoint and MS365 Records Management functionality.
25	Are there any required formats for the recorded training sessions?	MP4
26	The RFP specifies 'Instructor-led in-person and on-line training'. Is there a required amount of in-person training or can all training be on-line?	The majority of training will be on-line but some training will be in person. The amount will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
27	If there is a required amount of in-person training please quantify – percentage, hours, sessions, or other?	See question 26
28	If there is an in-person training requirement, does the Port have a training facility? Does the training facility support multi-user hands-on training?	Yes, and yes.
29	Are there any required formats for the customized training materials?	MS Word or MS PowerPoint.
30	How many total users are to be trained?	See question 2
31	Is the Port open to a train-the-trainer approach or is the requirement for direct instruction by the vendor?	We anticipate most training being delivered by the vendor trainers. However, some training could be train-the-trainer.
32	Does the Office Worker training include SharePoint site owners/content creators as well as end-users?	Yes
33	Is there any admin / technical training and if so what, or does all training target end-users?	No administrator training is required.
34	Will the trainees have access to actual working environments during the training in order to immediately apply the skills presented?	Yes
35	When will the production environments be available for use – before, during, or after training?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
36	What Office 365 licenses do users have?	Office workers have E5. Field workers have E3.
37	For online training, what online meeting software does the Port support? Teams? Zoom?	MS Teams is preferred. If the training vendor has online training software that they prefer then that is also acceptable as long as it is easy for our users to access and use and doesn't incur an additional cost for the Port.
38	For records management, is the concept of records management itself new, or are the users being trained on a new records management system as opposed to records management itself?	The concepts will be new to some users and will need to be covered in the training materials along with training on how to use the system.
39	Does the records management training include training on each Team's specific records plan?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
40	Which Office 365 workloads is RM enabled for? SharePoint/Teams/Exchange/One Drive?	We have not enabled RM for any MS365 components yet. We plan to enable this next year for all components you mention. However, more focus will be put on SharePoint and Exchange than the other components.
41	Is there any type of certification or recognition that users will receive on successful completion?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
42	Is assessment part of the training – i.e. testing, validation – or training only?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
43	How will training success be evaluated? Has the Port defined any metrics or evaluation metrics/methodology a deliverable?	This will be determined during creation of the Training Plan that is co-developed with the Port and the selected Training Vendor.
44	We would request the Port to give one (1) week extension in the proposal submittal date.	No.
45	Under the Port of Tacoma Terms And Conditions Personal Services Agreement, section 15. Term of this Agreement we request the Port to change "Consultant for its costs and fees incurred prior to the notice of termination." to "Consultant for its costs and fees incurred till the effective date of termination."	No.

46	If we have some additional exceptions to the **Port of Tacoma Terms And Conditions in the Personal Services Agreement**, just wanted to confirm that we can clarify them with the Port through email correspondence by sending mail at procurement@portoftacoma.com before the proposal submission due date as per guidelines provides on Page 2, *Background* section of the RFP and it will be responded to and confirmed by the Port, if those exceptions are allowed to be put in the proposal response. Please confirm.	Yes. The Port is also open to negotiations of certain terms after the perceived selected vendor has been notified.
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