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January 13, 2023

**TO:** All Prospective Bidders

**FROM:** Trent Ensley, Procurement Manager

**SUBJECT:** **ADDENDUM NO. 2 PWC2223020 – SharePoint Information Architecture & Content**

The specifications and bid documents are hereby modified or clarified per the attached documents.

1. Please complete and submit Appendix B when submitting your proposal.
2. The foregoing changes or clarifications shall be incorporated in the original Bid Documents and a **signed copy of this Addendum No. 2** shall accompany the bid to acknowledge the bidder's receipt and familiarity with the changes and/or clarifications. Everything else remains the same.

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Acknowledgement:

Company \_\_\_\_\_

By \_\_\_\_\_

Date \_\_\_\_\_

Vendor Questions w/Responses for IA and Content Migration	
Question	Response
Section #6 Scope of work, part 3 Information Architect: Can you elaborate on the requirements as it relates to compliance functionality in Section 3 on page 6 Configure core SPO features, including compliance...	DLP and Record management capabilities to support PWC compliance requirements with, but not limited to, NC Public Records Act.
Is there a specific permissions schema used in your existing SP solution? How many custom permission levels do you have?	No. The default permission levels are being used.
Do you use any BI features of the SharePoint Server? What is the source of the reports?	No BI features are currently in use.
Is your current SP solution integrated with 3rd party systems or services in any way?	Yes, migration and event management tools.
What is the current version of SharePoint on premises (SharePoint 2013, 2016, or 2019)?	N/A. SPO environment only.
Do you currently have SharePoint Online (SPO) based Intranet in use today? If not, what is the current SharePoint version used today?	Yes, SPO environment only.
Do you have any customizations in the current SharePoint environment?	No
Are the current SPO sites Classic or Modern?	Modern
Are you using Content Type Hubs today? Are there custom content types in place?	No
Are you using Taxonomy today (Managed Metadata Term Sets)?	No
Are you using any Custom workflows using Power Automate on top of SPO?	Yes. Several non-complex custom Power Automate flows.
Are you looking for 1 Home Site (Landing Site) template and 1 Department site template with 1 Department page template that all groups will utilize for consistency?	Yes, per dept.
Do you need a vendor also to help assess and configure MFA / DLP / Conditional Access Policies in Office 365?	Refer to RFP: Scope of Work.
How large is the current SharePoint environment?	Less than 400GB of data.
In the RFP, it states: "Conduct an assessment of the current SPO environment and tools." Can you share the estimate of how many pages, site collections, etc.? What tools (e.g., Teams, OneDrive, etc.)?	Less than 200 SP sites and less than 300 Teams. OneDrive tool.
Do you have any customizations in your SharePoint On-Prem or SPO (e.g., PowerApps, workflows, custom templates, custom permissions, etc.)?	No PowerApps, custom templates or custom permissions. Several simple OOB PowerAutomate workflows.
Do you have a current intranet? If so, is that on SharePoint On-Prem or SPO?	Yes, SPO environment only.
What are the existing content types? Content pages, files, databases, etc. Average size of each type for each site/subsite?	Only SP OOB/default Content Types and associated Item/Category are being used.
How many pages are expected in the new SPO?	Approx. 50-100
What do you mean by "define the access restrictions and Group permissions, including external and anonymous access"?	Refer to RFP: Appendix B. Requirement refers to users security roles. Identify, develop and implement strategies that incorporate the Principle of Least Privilege for PWC's various internal/external groups.
Out of your 650 employees how many use SharePoint?	Approx. 50% based on user activity for last 180 days.
Are you okay with a Train-the-Trainer model for End User Training?	Yes
Do you need Trainings (Admin, Content Author & End User) just around the new SPO?	SPO, Teams, OneDrive.
For the User Guides, we are planning to have 3 Guides (Admin, Content Author & End User Guides). Are these what you are looking for?	Yes, customized to the solutions proposed and implemented.
Do you have a Support Strategy in mind for after the engagement commences?	Yes. A hybrid Direct/Indirect Support Strategy will be adopted.
Do you want the proposal to include options for ongoing support post the Training/Knowledge Transfer phase?	If offered, post support should be included in the fixed pricing.
For the Communication Plan/Change Management work, do you have a corporate communication team that we would need to work with, or would the consulting partner be leading this effort?	Consultants would be working with PMO team to coordinate communication/change management.
How many people would be included in the training sessions, and how many sessions?	To be determined during discovery/planning phase.
Section #6 Scope of work, part 4 Data Migration: In addition to your network shares if there is any other data that has to be migrated please details the source and the size of the data	no
Section #6 Scope of work, part 4 Data Migration: Are you looking to migrate the permissions on your network share as is to SharePoint document libraries	Yes
Appendix B: The RFP document mentions migrating content to OneDrive as well, please detail which content will be migrated to OneDrive	~464 Shares Can provide a list if required.
What is the approximate volume of content that exists in File Shares?	~10.437 TB
Do you plan to use on-premise SharePoint after the migration process is over?	No
What file servers do you use (DFS/Windows Server or another)?	Windows Server.
A third-party tool will be needed to migrate data from one SP version to SPO. Is the offeror expected to provide guidance on and/or procure said migration tool, or does FAYPWC already have a tool?	PWC has a migration tool.
What data should be restructured and migrated to SharePoint Online – Does FAYPWC intend to maintain a hybrid on-premises/SPO environment (leaving some data on the legacy SP environment), or is the goal to migrate everything to SPO?	No hybrid environment.
Does content need to be migrated to SPO only, or Teams as well?	Refer to RFP: Appendix B SPO, OneDrive.
Will we have appropriate access and permissions to your source environments and Office 365 tenant to provide data Assessment & migration services.	Yes

Vendor Questions w/Responses for IA and Content Migration	
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Business will be involved in the creation of the data map which we'll use to migrate to the desired location. It involves clean-up of the source location data. Delete, Archive, move will need to be determined by the business. Will that work for PWC?	PWC intends to collaborate with our vendor and make the appropriate determinations through out the planning /implementation process.
The Vendor migrates copies of the content into the desired M365 locations, keeping the original as Read Only for a predefined period to be decided by PWC with Vendor's consultation.	To be determined during discovery/planning phase.
What is the number of sources/drives of information to be considered?	2 Drives
How many project sites will be migrated?	Less than 100
How many Team sites will be migrated?	Between 150-200
What types of information need to be migrated?	Documents, Forms, Folders..etc.
Appendix B: As it relates to the current SharePoint sites, what do you envision our tasks being as it related to those sites. There was a mention of archiving of some sites, beyond that, would there be additional scope?	Migration, Archiving, content re-structuring. Etc.
MISC: Is a vendor currently providing SharePoint services to the organization and can they bid on this project	No vendors are providing SP services.
How many sites/site collections have to be migrated?	Less than 500 sites.
Do you use and need to migrate personal sites and OneDrive's in the current SharePoint system?	No
What are the main SharePoint Services do you use and plan to migrate (Search, BDC, UPS etc.)?	N/A. SPO environment only.
Do you have any custom solutions in your current SharePoint system (custom design, web parts, jobs, workflows activities, etc.) that should be migrated? Can you describe them?	No
Does data need to be migrated AS-IS into the new SPO sites or does it need to be restructured/cleaned up?	Both
Assuming data must be migrated from current SPO sites to new SPO sites, are there any SP On Premise components also with PWC from where data must be migrated to SPO?	No
For the data migration are you only looking for the plan or to actually complete the migration?	Both
What is the expected start and end date of this project?	2nd Qtr FY23 - 3rd Qtr FY23.
Do you use Azure Active Directory?	Yes
What is your current version of SharePoint?	SharePoint in Microsoft 365 Formerly known as "SharePoint Online".
What is the term of the contract?	Refer to RFP Terms and Conditions.
There is a VENDOR INFORMATION FORM on Page 10 of the RFP, and it asks for a 'Yes' or 'No' response for SDBE, Minority, or Woman Owned Business Enterprise. We assume that a Vendor who is an MBE certified by any certification agency can checkmark the 'Yes' field. Please confirm.	Required to be US Government recognized certification.
Please provide clarification regarding the references section 5.1.5. on the types of references?	Refer to Appendix A.
Please provide the objective of the SharePoint - Information Architecture and Content Migration.	Refer to RFP: Background/Current State.
What Office 365 Licenses do you have?	E3 & E5
How many users does PWC have?	650
How many Divisions/Departments does PWC have?	Less than 20.
Which IT Ticketing system is used by PWC?	Freshdesk
Are there other M365 also in the scope of this engagement? (e.g., OneDrive, Teams, Exchange, Power Platform, Power BI?), or is it just SPO?	Refer to RFP: Appendix B SPO, OneDrive.
What is the main objective of launching SPO to your business users?	Refer to RFP: Introduction/Purpose.
Have you recruited an Executive Sponsor, Project Manager, and Tech Team along with Business Champions?	Yes
What is your definition of success?	Meeting or exceeding project requirements as defined in RFP: Scope of Work/Appendix: B.
Do you have a Communications office, and will they be involved with the communication campaign?	Yes
Are there any specific Support SLAs (Service Level Agreements) that you are looking at during the support period that you can clarify?	No
What is the estimated budget for the entire project?	TBD
Could you please grant an extension on the due date?	Yes, due date extended to Jan 25, 2023 @3:00pm.
Do you currently already have M365?	Yes
What workloads are already deployed in M365	N/A. SPO environment only.
Is the tenant a commercial tenant or GCC?	Commercial
How many potential divisions/departments will be involved or be sites?	Less than 20.
For the security requirements (conditional access, Data Loss Prevention and Multi Factor Authentication) are you licensed for these features?	Yes
Can you briefly state the architectural and content management challenges that need to be resolved by the new solution?	Proliferation of documentation, Content findability, Content Approval, Application Integration, Versioning.
Section #3.6: Are you requesting a Certificate of Insurance with our proposal submission. Can we meet the insurance requirements via two different policies.	The awarded vendor will need to provide a COI prior to starting work. Yes.
What is the primary work location for this project, Can we perform this scope from outside of US i.e. Canada, India.	Fayetteville, NC. Yes
Does the offeror have to be registered as a vendor on the iSupplier Portal prior to submitting a proposal?	The awarded vendor will need to register as a supplier.

Vendor Questions w/Responses for IA and Content Migration	
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Are out-of-state offerors allowed to submit a proposal? Do we need to be registered with the state of North Carolina?	Yes, out-of-state offerors may submit a proposal.
Is a specific role of the POC reference (i.e. government employee, management, director, etcetera), required?	Not specifically. Whomever your project manager may be.
Does it have to be three references from three different clients if the offeror provided services to multiple customers within one large agency?	Yes, but provide both if it's not clear.
Is PWC open to a hybrid team working on this project (split between US-based resources and offshore resources from another country)?	We are only awarding to one company. Your team is your choice.
Does PWC share the Cost Proposal format with us?	The cost proposal format is yours - we don't have a template for that.
Can you provide the points allocated for each Qualification Evaluation criteria in Section 7 of the RFP so that we can be better informed on how the scoring will be allocated?	Total points is 100. We are looking for the following categories: Strength and stability, experience on similar projects, overall responsiveness and completeness of proposal, a demonstrated clear understanding of the scope, personnel, subcontractor qualifications and costs.
Please provide clarification regarding the references section 5.1.5. on the types of references?	Refer to RFP: References. Business references.
If we need to submit any sample Certificate of Insurance, please share the cert holder's name and address to be put in the sample COI.	Not necessary.
Does PWC allow the vendors to submit the proposal via the same Email to which we are sending the questions, in place of paper submission?	It is required that hard copies be mailed to the address in the RFP. You may send an email copy in addition, but sending hard copies via mail is required.
Please clarify the Appendix B submission requirements.  A.) Do we need to submit Appendix B with the proposal as, under Section 5 PROPOSAL CONDITIONS submittal format, it is not mentioned anywhere that Appendix B is needed We request that you clarify the Appendix B submission requirements.	Yes, please complete Appendix B and submit with your proposal.
In section 5.14, point A is mentioned. Include a description of office location(s), organizational structure, number of years in business, and annual revenue.  What details need to be provided for the Annual Revenue?	The total amount of money company makes during the last 12-month period from the sale of products, services, assets or capital. Annual Revenue are required.
If annual revenue are required in the proposal, how will PWC protect and keep these data for confidentiality and non-disclosure?	Most company's annual revenue is public. Please reach out to our legal dept with any concerns.
Should the cover letter have a wet signature?	Yes
Is a digital signature accepted?	Yes
Is there a font restriction on style and size for the Executive Summary?	No
Statement of Qualifications 5.1.4, Point D: Can we provide sample resumes, or do they have to be W2 employees?	Please provide resumes for project team members.
Is there a point-guided evaluation for each section of the RFP Response?	Yes
Is it required to provide the COI alongside the proposal response?	No, only the awarded proposer will be required to provide a COI prior to starting work.
Can the team members work from an offshore location?	Yes. Members must be available during PWC business hours.
Do we need to provide the Non Disclosure alongside the proposal response?	The awarded vendor will be provided a non-disclosure to sign.