

Miami Conservancy District Office 365 Planning and Implementation Project Request for Proposals

This Request for Proposals (RFP) will result in the engagement of an experienced firm to partner with the Miami Conservancy District (MCD) on its Microsoft Office 365 (365) planning and implementation project.

The successful firm will have the knowledge and experience to strategically position MCD for success on the 365 platform assisting us to identify, prioritize, develop, and deploy solutions and adopt best practices that accomplish our business objectives, manage costs, and meet our compliance requirements. Knowledge and experience deploying solutions for government retention is required. Experience working with government organizations similar in size, scope and requirements to MCD coupled with experience implementing private sector functions that have commonality with government functions preferred.

For more information, contact: Shannon Phelps by email at sphelps@mcdwater.org.

Copies of the detailed RFP may be obtained on the MCD's website: www.mcdwater.org.

Responses should be submitted via email to sphelps@mcdwater.org no later than October 17, 2024, at 5:00 p.m. time to be considered.

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Project Description

The successful firm will have demonstrated competence and experience in the following areas:

- Information governance services
- Technology enablement services on the Office 365 platform
- Business strategy services
- Change management and user adoption

Current State

The Miami Conservancy District is a flood protection agency whose headquarters is in Dayton, Ohio. MCD converted to Microsoft 365 as its primary communication and collaboration technology platform in March of 2023.

MCD is embarking on the second phase of our 365 initiative to build the future of work on the 365 platform using Teams collaboration, SharePoint Online, and other available tools. MCD has around 50 employees across departments.

Systems and Information

- 30 M365 Business Standard, 22 M365 Business Basic, 4 Project License Plan 3
- MFA—multi-factor authentication security enabled organization-wide
- Migrated from Exchange on prem to Exchange Online
- Changed from Zoom to Microsoft Teams
- Information management
 - Fileservers (20 TB)
 - No current email archive solution
- Information policies for paper-based records
- Intranet is located on our website platform, but no longer supported
- Limited use of OneDrive by some staff
- Limited VPN access to file shares and applications
- “Bring Your Own Device” allowed, but not supported by IT

Initial Scope of Services

The selected firm will assist MCD in developing an Office 365 strategic roadmap to meet the following goals:

- Manage change through a thoughtful incremental rollout
- Right-size governance and security strategies for Teams, SharePoint Online and Office 365 Groups, avoiding sprawl
- Communication tools for executives and stakeholders to outline the delivery of Office 365 services
- Setting retention periods within Office 365 and assisting with the determination of how/when documents need to be saved outside of Office 365.

Strategies:

- MCD desires to use out-of-the-box functionality as much as possible.
- We want our Office 365 governance framework to meet our compliance obligations without unduly restricting innovation and employee productivity.
- The selected firm will facilitate high level discovery sessions with key stakeholders to identify and prioritize key business drivers, assess risk and compliance requirements, assess change readiness, and identify first phase Teams and SharePoint sites.

Combined results of discovery sessions and firm expertise will help answer the following questions:

- What business problems are we solving for?
- Which apps do we enable for our users?
- When do we engage different groups and departments?
- How do we break up Microsoft 365 opportunities into projects?
- How long will those projects take?
- How much budget do we need for the rollout?
- How do we right-size governance for our users?
- What projects are quick to deploy and generate user goodwill and buy in?

Deliverable: Discovery Sessions

Lead and facilitate high level information gathering sessions with stakeholder groups to gather and document business and functional objectives and 365 IT landscape. Information gathering sessions should be structured to gather information necessary to complete other deliverables required in this RFP.

Deliverable: 365 Strategic Framework and Roadmap

The selected firm should lead and facilitate information gathering sessions with the 365 Team and key MCD leaders to gather and document high level business and functional objectives. The firm will create a high-level 365 Strategic Framework and Roadmap that outlines the overall strategy and approach to providing the requested system and services by articulating solution risks and barriers; recommending project approaches; preparing time and cost estimates; and planning project life cycle. The roadmap must contain an outline of the significant sub-projects identified during discovery required for provision of the requested services and S.M.A.R.T. goals (specific, measurable, attainable, relevant, and timebound) MCD can measure progress against in future. Each

step should include metrics to assess user adoption, quality improvement models, and survey instruments. The roadmap may contain proposed future components or projects outside the initial scope of work.

Change Management & Training

Each component of the project should include a training plan to identify the training necessary for successful system deployment and maintenance, as well as IT administration and user level training. Training materials developed should enable MCD to provide ongoing training of future Teams/SharePoint content managers on technologies and governance policies to sustain our information framework.

Deliverable: Training Plans and Metrics

Role-based training plan that can be systematized to launch our 365 initiative and maintain its momentum as user adoption grows and the 365 platform is updated. The training plan must incorporate communications strategy, key messaging and recommendations for the formats that best promote user adoption. MCD would like to track user training as a performance metric. The training plan should include appropriate role-based information about governance and compliance requirements.

Teams Deployment

Using information gathered during discovery, build a governance framework for the deployment of Teams.

Deliverable: Teams Governance Framework

Governance framework should include the following:

- Establish policies for who can create Office 365 groups and Teams, 365 Group and Team naming conventions, classification, and guest access
- Provide for lifecycle management for Teams
- Establish Group and Team expiration, retention, and archiving policies
- Create an implementation guide MCD can use to deploy future teams that will establish a sustainable approach for Group and Team membership and feature management given MCD's operating environment

SharePoint Deployment & Functional Hub Sites

Evaluate and report on which business functions are better served by SharePoint sites and create a roadmap for creation and deployment of clean, functional, user-friendly sites. Implement enterprise search capabilities to promote better collaboration, discovery, and compliance (term store, labels, taxonomy, and metadata framework). Guide initial creation of SharePoint hub sites and provide best practices for scalable growth and internal maintenance using out of the box capabilities and standardized SharePoint sites from the SharePoint lookbook.

Deliverable: SharePoint Governance Framework

Based upon use cases and needs, develop a model for scalable deployment and maintenance of SharePoint sites.

Information Governance, Retention & Compliance

Assist in the development of information governance policies that do not impede user productivity, consistent with good governance best practices, and aligned with modern security capabilities and norms.

Deliverable: Records Retention Plan Execution

Advise and execute a plan for the retention schedule developed by MCD based on Microsoft 365 capabilities, Teams/SharePoint Governance, and regulatory considerations.

Deliverable: Security and Compliance Governance Recommendations

Propose recommendations for best practices for security and compliance policies, groups based on the MCD's regulatory requirements and business practices and experience with similar organizations. Recommendations for compliance center configuration, security and administration, documenting how users, network, applications and overall information security will be managed and maintained. Assist in updating MCD's electronic security policies with best practices for consistent ongoing implementation. Recommend security labels and best practices, with consideration for future enabling of legal and regulatory holds.

Deliverable: Propose Future Scope(s) of Work

Proposed future components or projects outside the initial scope of work on the strategic roadmap including business process automation, email management, dashboards, metrics, additional governance tasks, etc.

Timeline

Upon entering into a contract, the initial scope of work should be completed within 6 months.

Proposal Content

Please include the following information in your proposal:

1. Firm name with contact information
2. Firm information
 - a. Location
 - b. Number of years in business
 - c. Number of full-time employees devoted to developing and deploying solutions for your client base
 - d. Client list for the past 3 years and brief summary of recent 365 projects completed for each
3. RFP primary contact person and contact information
4. Project team that will work on current and future phases of this project:
 - a. Project manager, including experience and certifications that relate to this project
 - b. Key staff qualifications, experience, and certifications that relate to this project
5. A description of your firm's approach to 365 planning and implementation including your firm's experience and qualifications to deliver needed services.
6. Proposed project roadmap and timeline for the initial project deliverables including consultant responsibilities and MCD responsibilities.

7. A minimum of three client references that have performed similar services to those listed in this RFP including the name and contact information for the client's project manager. Two of these references must be government clients. Please note what services were provided for each and include case studies, if available.
8. Project cost proposal for the initial phase of this project that includes line-item details of project expenses, including personnel and other direct costs and your firm's preferred payment terms.
9. Other information that will make your proposal standout

After the preliminary evaluation of the firms' qualifications, MCD's RFP review team will conduct interviews with finalists and select the firm best suited to provide the services desired. A contract will be negotiated according to the scope, complexity, and nature of the services provided. A contract is then negotiated at a price that MCD and the selected firm determines to be fair and reasonable given the estimated value of the services and the scope, complexity, and nature of such services using the price submitted as the basis for negotiation.

MCD reserves the right to select or reject any and all RFPs. If all RFPs are rejected MCD may re-advertise under the same or new specifications. All factors will be considered and MCD reserves the right to select the firm and proposal that, in their opinion, best serves MCD's project interests and goals. This may not be the lowest cost proposal. Unsuccessful firms will be notified as soon as possible.

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