



Request for Proposals: IT100: SharePoint Server 2010 Implementation Support

RFP Issue Date: 6/14/2010

Proposals Due: 7/12/2010

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Appendix A Preliminary Project Tasks

1. Introduction

The Northwest Energy Efficiency Alliance (NEEA) is a non-profit organization funded by Northwest utilities, the Bonneville Power Administration and the Energy Trust of Oregon. We work in collaboration with our stakeholders and strategic market partners to accelerate the market adoption of energy-efficient products, technologies and practices within homes, business and industry. This unique partnership has helped make the Northwest region a national leader in energy efficiency. Please visit our website at www.nwalliance.org for more information on NEEA and its work.

2. Background

NEEA has an internal staff of approximately 50 fulltime employees and additionally employs a network of vendors and subcontractors to carry out its mission. NEEA has a great deal of information that currently resides on websites, in reports, in our custom CRM and Project Tracking system, and on various network and local drives. As NEEA's mission has grown, not only has the volume of information increased, but the need to effectively communicate information and engage in other collaboration activities has grown. These needs are both internal and with various external parties.

NEEA is deploying SharePoint Server 2010 and envisions this platform as the primary solution to provide our staff with a unified environment within which to collaborate, store, search, surface, share and retrieve information, both internally and with various external parties.

NEEA's SharePoint implementation will take a phased approach and will begin with a small number of pilot projects. These pilot projects will focus on SharePoint Server 2010's information sharing, social computing, and portal functionality. Examples of potential pilot areas include:

- An external portal for the Residential Sector which allows named users to view information, upload and download documents, and participate in discussions.
- An internal portal which allows the HR team to post HR and benefit forms and answer employee questions about general benefits.

As initial pilot areas are completed, new areas will be identified and scoped. While the scope of the initial pilots may include some document collaboration and management functionality, it does not include a mass import of existing file shares.

NEEA anticipates its SharePoint Server 2010 implementation project to begin in mid-2010 with the *initial* implementation complete in late 2011 or early 2012. NEEA has a fulltime SharePoint developer/analyst and expects significant involvement of business staff in whatever functional areas are currently being focused on.

NEEA is interested in SharePoint's potential as a content management system for public facing websites but this is not expected to be included as part of NEEA's initial implementation.

The purpose of this RFP is to select an implementation partner to assist NEEA in configuring its SharePoint environment and serve in an advisory/consultative role for the remainder of 2010. NEEA may, at its sole discretion, elect to continue or not continue the implementation partner relationship beyond 2010 based on need, value provided, and project status.

3. Scope of Work

NEEA anticipates the following as the scope of work related to this RFP. The hours identified below are approximate and are intended to convey a general degree of scope rather than finalized budgetary inputs.

3.1 NEEA SharePoint Infrastructure Design (40 hours)

Working with NEEA staff the SharePoint implementation partner will assess NEEA's current and likely future needs and recommend an infrastructure design that will best meet NEEA's needs and resources. In this context "resources" should be assumed as both human and financial. This work is to be completed as soon as possible and is assumed to be on-site in nature.

3.2 NEEA SharePoint Infrastructure Implementation (70 hours)

The SharePoint implementation partner will assist NEEA staff in building and configuring NEEA's SharePoint infrastructure. This work is to be completed as soon as possible and is assumed to be primarily on-site in nature.

3.3 SharePoint Development Expertise (110 hours)

On a regular and requested basis the SharePoint implementation partner will review current development, provide advice as needed, and perform some development tasks. This work will occur over the remaining 2010 calendar year and is assumed to be a mixture of on-site and remote in nature.

4. Deliverables

NEEA anticipates the following deliverables related to this RFP:

4.1 NEEA SharePoint Infrastructure Recommendation

4.2 Implementation Assistance of NEEA's SharePoint Infrastructure

4.3 Assistance in Planning and Estimating of Development Work

Appendix A Preliminary Project Tasks contains a list of typical SharePoint implementation tasks. Based on The SharePoint implementation partner's understanding of NEEA's needs, they will work NEEA staff in developing the overall SharePoint implementation plan.

The SharePoint implementation partner will also be expected to assist NEEA staff in developing estimates to implement portals for various NEEA functional areas.

4.4 Ongoing Best Practice Reviews and Recommendations

4.5 Specific Configuration and/or Coding / Development Tasks, as requested

4.6 End of Project report, including at least the following:

- Summary of SharePoint implementation status and project accomplishments
- Lessons learned
- Identification of next steps in the SharePoint implementation
- Going forward recommendations
- Risks and potential mitigation strategies

5. Reporting and Communication

5.1 Status Reports

The SharePoint implementation partner will prepare and deliver monthly status reports. Status reports shall include at least the following:

- Overall status of SharePoint implementation
- Summary of work the implementation partner participated in
- Issues
- Status of existing risks and identification of new risks
- Hours worked
- Anticipated work for the next month

5.2 Working Communication

It is expected the SharePoint implementation partner on an ongoing basis will effectively communicate with NEEA's SharePoint Systems Analyst and IT Manager.

6. Contractor Qualifications

The SharePoint implementation partner is *expected* to have deep SharePoint skills. Specifically, NEEA is asking for:

- Minimum of three years of experience working with SharePoint Server Enterprise implementation and design.
- Minimum of three similar projects that demonstrate experience in an organization that successfully implemented or started a SharePoint Server Deployment.
- Solid project management and team leadership skills

NEEA further *desires* employees of the SharePoint implementation partner to have the following or similar certifications:

- Microsoft SharePoint Server Deployment Planning
- Microsoft Gold Certified Partner with Information Worker Competency
- SharePoint Server Portals and Collaboration
- Microsoft Certified Systems Engineers
- SharePoint Server Certified Microsoft Certified Technology Specialists

7. Proposal Process

7.1 RFP Schedule

6/14/2010	RFP issue date
6/28/2010	Intent to Respond due by
6/28/2010	Questions submitted by
7/02/2010	Answers to Questions emailed back by
7/12/2010	Written Proposals due by
Mid July	Selection of Finalists
Late July	Finalists' Presentations
Early August	Contract Award Date

7.2 RFP Point of Contact

All correspondence, included but limited to, questions and submissions shall be directed to:

John C. Thompson
Systems Analyst, SharePoint Technologies
jthompson@nwalliance.org

Northwest Energy Efficiency Alliance
529 SW Third Avenue, Suite 600
Portland, OR 97204
Phone: 503-827-8416, ext 287
Fax: 503-827-8437

Where possible, please use email for all correspondence, including proposal submission. Be sure to include "RFP: IT100" in the subject line of all emails. Where traditional mail is used, please be aware that materials must be received by NEEA prior to close of business of the date specified in the RFP Schedule above.

7.3 Intent to Respond

NEEA requests that parties electing to respond to this RFP submit an "Intent to Respond." The Intent to Respond may be an email or letter received by NEEA prior to close of business of the date specified in the RFP Schedule above.

Included in the Intent to Respond shall be the following:

- Formal name of the organization responding
- Statement indicating intent to respond
- Contact information including email address

If a potential respondent elects not to respond, NEEA also welcomes an email stating reason(s) the potential respondent chose not to respond. This information is useful for NEEA in planning future RFP solicitations.

7.4 Questions

Questions about NEEA, this RFP, or NEEA’s SharePoint expectations may be submitted to the RFP Point of Contact. Questions must be received by NEEA prior to close of business of the date specified in the RFP Schedule above.

Responses to questions will be emailed, on or about the date specified in the RFP Schedule above, to the point of contact of all parties who submitted an Intent to Respond.

7.5 Proposal Format

Respondents are requested to adhere to the following format:

1. **Cover Letter** – Include an overview of your organization and rationale why you feel your organization is a good fit for NEEA’s needs.
2. **Approach to Project** – Discuss how you would approach this project and provide, as applicable, any comments on NEEA’s proposed plan. NEEA encourages respondents to submit proposals that include innovative methods and/or tasks that highlight their unique value. However, this should not be construed as an encouragement to not follow established and best practices. Include an identification of major project risks and mitigation strategies.
3. **Qualifications** – Include at least three (3) case studies or examples that demonstrate your capabilities related to this project. Also list specific SharePoint-related certifications.
4. **References** – Provide at least three (3) references for similar work conducted.
5. **Proposed Team** – Provide expected team composition including team member bio-data. Note: Proposed staffing is a significant factor in respondent selection. As such, no changes in key staff or changes in roles/responsibilities can be made without the written agreement of the NEEA project manager. NEEA is aware that the “Proposed Team” may consist of single staff person.
6. **Cost** – Provide estimated cost breakdown by scope item (per Section 3 Scope of Work) and applicable rate sheet. Please include any travel related expenses, if applicable.

Sections 1, 2, and 3 should comprise no more than 10 total pages. The total proposal should be no more than 15 total pages.

If submitted electronically, NEEA requests that RFPs be in either MS Word 2003 or Adobe PDF format.

7.6 Finalists Presentations

NEEA may select one or more finalists for an on-site presentation. The purpose of this presentation is to meet the respondent’s proposed team, review the respondent’s proposed approach, and provide both NEEA and respondents the opportunity for questions and discussion.

8. Selection

8.1 RFP Scoring

The RFPs of responding firms will be rated among others in terms of:

1. Responsiveness to the RFP and demonstrated understanding of the issues surrounding the project.
2. The thoughtfulness and appropriateness of the proposed methodology used to accomplish the desired results of the project.
3. The experience and qualifications of the individuals specifically proposed to execute and manage the project.
4. The experience of the firm making the proposal.
5. The capability to execute the plan.
6. Cost.

8.2 Finalists Scoring

Finalists will be rated on the same factors as described above (section 8.1 RFP Scoring) except that the final ratings will combine information from both the respondent's RFP and presentation.

9. Insurance/Warranties

Without limiting any liabilities or any other obligations of Contractor, Contractor shall, prior to commencing work, secure and continuously carry with insurers having an A- rating (or better) from A.M. Best Company the following minimum insurance coverage:

Commercial General Liability insurance with a minimum single limit of \$1,000,000. The coverage shall include:

1. Bodily Injury and Property Damage Liability;
2. Contractual Liability;
3. Products and Completed Operations to protect against and from all loss by reason of injury to persons or damage to property, including all third persons, and property of NEEA and all third parties based upon or arising out of Contractor's operations hereunder, including the operations of its subcontractors of any tier.

10. Miscellaneous

10.1 NEEA Rights Reserved

NEEA reserves the right, in its sole discretion, to take actions deemed in NEEA's best interest that may include any one or more of the following:

- Reject any or all proposals in whole or in part
- Waive any minor irregularities or informalities in a proposal
- Make multiple awards and enter into relationships with more than one respondent
- Vary any timetable or schedule
- Suspend or modify the RFP process
- Negotiate the details of a proposal prior to contracting

10.2 Ownership and Return of Proposals

All materials submitted in response to this RFP shall become the property of NEEA and shall not be returned to the respondent.

10.3 Proposal Costs

Each proposal prepared in response to this RFP will be prepared at the sole cost and expense of the respondent and with the express understanding that there will be no claims whatsoever for reimbursement from NEEA.

Appendix A Preliminary Project Tasks

This appendix provides a list of typical SharePoint implementation tasks. Per section 4, Deliverables, the SharePoint implementation partner will assist NEEA staff in developing NEEA's implementation plan.

1 Establish NEEA SharePoint Server 2010 enterprise deployment plan.

1.1 Develop NEEA SharePoint Server 2010 Strategy with an outcome that defines the approach in providing training and the deployment of SharePoint Server 2010.

1.1.1 Develop NEEA SharePoint Server 2010 Deployment Mission

1.1.2 Develop NEEA SharePoint Server 2010 Change Management Plan, which includes:

1.1.2.1 Develop Strategic Communications Plan

1.1.2.2 Develop Training Plan that will provide first-time SharePoint Server 2010 users the fundamentals of creating, managing, publishing their work in a collaborative environment and train site administrators on site management.

1.1.3 Develop NEEA SharePoint Server 2010 Governance model that will create the infrastructure to govern and support the SharePoint Server 2010 environments, document initial governing policies and procedures of the SharePoint Server 2010 environments, and communicate the need for the business to provide support in managing requirements via people resources.

1.1.4 Develop NEEA Enterprise Architecture Diagram

1.2 Execute SharePoint Server 2010 Envisioning with focus groups.

1.2.1 Conduct Envisioning sessions with each of the divisions within NEEA to identify potential problems and improvement opportunities for implementation of functionalities within SharePoint Server 2010

1.2.2 Establish SharePoint Server 2010 requirements list and evaluate for SharePoint Server 2010 applicability

1.2.3 Identify prioritized requirements, incorporating feedback from designated NEEA stakeholders and business owners.

1.2.4 Develop a high level project plan for SharePoint Server 2010 deployment and establish major milestone decision points for enterprise deployment plan.

1.3 Establish and execute stakeholder management and information plans and events:

1.3.1 Meet with each of the divisions within NEEA, on a quarterly basis, to validate and update requirements, explain planned SharePoint Server 2010 features and functionality and determine training requirements

1.3.2 Update SharePoint Server 2010 Governance Model as needed to reflect changes in requirements and NEEA operating requirements.

1.4 Provide NEEA leadership with quarterly briefings to include reports, planned actions and resources required to execute the NEEA SharePoint Server 2010 deployment.

2 Implement SharePoint Server 2010 across the NEEA Enterprise.

2.1 Aid in the SharePoint Server 2010 Deployment to include project management, cost management, schedule management, risk management and change management as established in 1.1.1

2.2 Execute SharePoint Server 2010 Deployment Planning

2.3 Execute SharePoint Server 2010 Deployment Training Plan as established in 1.1.2.2;

2.4 Execute SharePoint Server 2010 Deployment, Implementation and Configuration Management to meet the requirements as established in 1.2.4.

2.4.1 Provide technical leadership and subject matter expertise in establishing SharePoint Server 2010 in a scalable environment.

2.4.2 Configure SharePoint Server 2010 to reflect NEEA Enterprise mission and objectives

2.4.3 Verify quality control and compliance with the established Governance plan.

2.5 Provide the following SharePoint Server 2010 Capabilities configured to support NEEA Business Processes

2.5.1 Core Collaboration Services

2.5.1.1 Implement Team Sites to enable NEEA organizations with workspaces and access to all enterprise services provided in this platform

2.5.1.2 Implement Shared Calendars, Document libraries, Contact Lists, Task lists, Alerts & Personalization

2.5.1.3 Implement Enterprise Search to enable users to find documents, SharePoint Server 2010 Content, People and related Social Networking content.

2.5.1.4 Implement Performance Dashboards and Key Performance Indicators (KPIs) as defined by the stakeholders for reporting at the enterprise level and individual team site level

2.5.1.6 Implement Enterprise Workflows that map NEEA existing and future business processes

2.5.2 Identity Management

2.5.2.1 Establish and authentication model, consistent with existing security protocols

2.5.2.2 Implement the SharePoint Server 2010 Secure Store for access to all SharePoint Server 2010 content

2.5.3 Third-party Software/System Integration

2.5.3.1 Establish an integration framework using SharePoint Server 2010 for integration with existing NEEA IT investments as well as internal and external data sources.

2.5.3.2 Enable NEEA to publish information in the SharePoint Server 2010 enterprise, and to other systems and organizations easily via the SharePoint Server 2010 publishing infrastructure and SharePoint Server 2010 web services

2.5.3.3 Establish SharePoint Server 2010 as the single portal that NEEA uses to render all IT system information

2.6 Execute testing and validation of SharePoint Server 2010 Deployment

2.6.1 Aid in the process of User Acceptance Testing (UAT). The contractor shall work with NEEA's internal resources for the testing of application throughout its stages of development. The successful UAT process shall ensure that the SharePoint Server 2010 application passes all User Acceptance Tests (UAT's) and meets all requirements as verified by NEEA. The criteria for acceptance are that the system performs the functions which are outlined in the approved requirements list.

2.6.2 Execute Operational Acceptance Testing (OAT). This ensures that the SharePoint Server 2010 Farm is fully operational and that said farm has reliability, and maintainability, and conforms to the processes automated.

2.7 Develop plan for post-implementation of on-going operations, maintenance optimization and business review that will enable NEEA to maintain operation.