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ADDENDUM NO. 1

REQUEST FOR APPLICATIONS FOR STANDING OFFER AGREEMENTS (RFA-SOA) NO.:	1220-060-2019-015
TITLE:	ELECTRONIC CONTENT MANAGEMENT (ECM) PROGRAM – MIGRATION TO SHAREPOINT
ADDENDUM ISSUE DATE:	SEPTEMBER 17, 2019
CLOSING DATE:	PREFER TO RECEIVE APPLICATIONS ON OR BEFORE SEPTEMBER 24, 2019

INFORMATION FOR CONTRACTORS

This Addendum is issued to provide additional information and clarifications to the RFA-SOA for the above named project, to the extent referenced and shall become a part thereof. No consideration will be allowed for extras due to the contractor not being familiar with this addendum. This Addendum No. 1 contains three (3) pages in total.

Q.1. What qualifications are you looking for in an implementation partner? For example, Microsoft Gold and Silver Competencies, Microsoft Certified Masters, etc.? Will the scoring take our credentials into account?

A.1. Refer to Schedule A, Section 10, Preferred Qualifications for the qualifications the City prefers from Applicants. Refer to Section 13, Evaluation Criteria of the RFA-SOA for evaluation criteria.

Q.2. Remote project delivery typically enables us to reduce project duration and costs. Most of the projects we do *could* be delivered 100% remotely however, we sometimes find it useful to be onsite during discovery meetings, training, etc. Considering the potential effect on project duration, resource availability, and cost on a scale from 1 to 5 where 1 represents "100% onsite project delivery" and 5 represents "100% remote project delivery", what are your requirements on this continuum?

A.2. Refer to Schedule A, Section 7, Location and Travel.

Q.3. Regarding your current experience with SharePoint and/or O365, if you are using either:

- a. Are you currently using SharePoint on-premises and if so:
 - i. What version?
 - ii. Will content from the on-prem farm be migrated to SharePoint Online?
- b. What is the current breath of usage in terms of number of:
 - i. Departments

- ii. Users
- iii. Site Collections

- c. For what workloads are you currently using SharePoint/O365 (e.g. collaboration portals, document management)?
- d. What, if any, problems or dissatisfaction have you experienced with SharePoint/O365?
- e. Do you already own any SharePoint-related products (e.g. ShareGate, Nintex, etc.) and if so, which ones?
- f. On a scale from 1 to 5 where 1 represents “None” and 5 represents “Expert”, can you please indicate what SharePoint/O365 skills you currently have in house in terms of:
 - i. Infrastructure, Administration and Maintenance
 - ii. Information Architecture Design and Implementation
 - iii. Content Owner/Authorship
 - iv. PowerShell and C# Development

A.3. Please refer to Schedule A. We are using SharePoint Online. We have approximately 180 site collections. We use SharePoint team sites for collaboration and document management. We have ShareGate for data migration. We rate ourselves 3-3.5 out of 5 in terms of SharePoint/O365 skills.

Q.4. Regarding the requirement stated in the RFA-SOA as “Content Migration to SharePoint Online”; is the source system Windows File Shares, SharePoint on-prem, and/or some other source repository? Please provide additional details.

A.4. Almost all are share files.

Q.5. Regarding the requirement stated in the RFP as “Workflow design in SharePoint Online”:

- a. Are the required workflows centered on document approval and records management (e.g. disposition policies) or do they include process workflows to automate line of business functions?
- b. Can we assume that the workflows are very simple in nature (e.g. document approval)?
- c. If you have knowledge and experience with SharePoint, do you anticipate that the required workflows can be addressed with using SharePoint’s built-in workflow capability?

A.5. The workflow could be from document approval to automate line of business functions, depends on business needs.

We hope most workflow can be addressed using Flow plus some PowerShell or C# Developments.

Q.6. Regarding the requirement stated as “SharePoint Online integrations”:

- a. What specific systems require integration?
- b. What level of integration is anticipated (e.g. hyperlinks only, document-level integration, unidirectional/read only, bidirectional data updates, functional integration)?

A.6. The integration could be from various applications to SharePoint Online. But we assumed at this point, most data exchange can be triggered from database level (Oracle or SQL) to SharePoint Online.

Mostly one-way data updates; but may require bi-direction data updates sometimes.

Q.7. Can you please provide additional information and use cases for the requirement stated in the RFA-SOA as “complex sites”?

A.7. One use case of “complex sites” is that the City has millions of addresses, each address has numerous documents associated to it. Different business processes use the information in various ways.

Q.8. On a scale from 1 to 5 where 1 represents a local vendor within 25 miles of your operation and 5 represents a vendor in the US, what is your preference for this engagement? In other words, please rate your preference for a local vendor.

A.8. This is an open competition.

Q.9. Regarding Schedule B, #11, page 37 of the RFA-SOA No. 1220-060-2019-015 document, specifically “*The City of Surrey requires that the successful Applicant have the following in place before performing the Services*” and subsections “(d) *City of Surrey or Intermunicipal Business License...*” and “(f) *If the Applicant is a company, the company name indicated above is registered with the Registrar of Companies in the Province of British Columbia, Canada...*”. Please confirm that vendors bidding from outside British Columbia can provide the required information after contract award and prior to performing services.

A.9. Yes, the successful Applicant(s) can submit the required information after the contract award and prior to performing the Services.

END OF ADDENDUM

All Addenda will become part of the RFQ Documents.
