



# Intranet Replacement Digital Workplace

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Request for Proposal (RFP)  
May 9, 2018

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## Purpose

The purpose of this request for proposal (RFP) is for the City of Olympia (City) to solicit proposals from qualified vendors for a platform and/or consulting services for the replacement of our existing intranet and building a foundation for a digital workplace.

Response to this RFP does not commit the City to pay any costs incurred in the preparation of the response, demonstrations, or any other activities related to this response. All responses and accompanying documentation become the property of the City and will not be returned. This RFP does not obligate the City to contract for services or products specified herein. The City reserves the right to revise the RFP and/or to issue addenda to the RFP.

## General Information

### Definitions

Relative to this document, and any addenda incorporated therein, the following definitions apply.

- **RFP:** Request for Proposal
- **SharePoint:** Microsoft SharePoint Online hosted on government tenant
- **O365:** Microsoft Office 365 hosted on government tenant
- **Information Architecture:** Structural design and configuration, to include:
  - Site Hierarchy – sites, libraries, document sets, and views;
  - Navigation – mega and side;
  - Search;
  - Security;
  - Managed Metadata;
  - Content Types
- **Governance:** Documented ownership, management model, and structure to provide clarity and rules around roles and responsibilities.

### Schedule

The following schedule is to inform vendors of the estimated timetable of the RFP response preparation and evaluation. Please note the following dates when preparing your response to the RFP. The City reserves the right to modify this schedule at its discretion; timelines will never shorten.

| SCHEDULE DATES   | ORIGINAL DATE            | MODIFIED DATE           |
|--|--------------------------|-------------------------|
| Issuance of Request for Proposal (RFP)                           | Wednesday, May 9, 2018   | N/A                     |
| Deadline for letter of intent and vendor clarification questions | Tuesday, May 22, 2018    | N/A                     |
| Answers to questions provided to vendors                         | Friday, May 25, 2018     | Tuesday, May 29, 2018   |
| Proposal responses due from vendors                              | Monday, June 11, 2018    | Monday, July 2, 2018    |
| Finalist(s) selected and notified                                | Wednesday, June 20, 2018 | Monday, July 23, 2018   |
| Finalist(s) Interviews/Demo                                      | Week of July 9, 2018     | Week of August 13, 2018 |

*Note: The schedule was modified and RFP reposted on 5/25/2018.*

## RFP Coordination

The RFP Coordinator is the sole point of contact at the City for this RFP. All communications between the vendor and City upon release of this RFP shall be with the RFP Coordinator via email, as follows:

- Melynda Schmitt
- Digital Workplace Manager
- [mschmitt@ci.olympia.wa.us](mailto:mschmitt@ci.olympia.wa.us)

## Notice of Intent

Vendors wishing to submit proposals are encouraged to provide a written notice of intent to propose by Tuesday, May 22, 2018. An email sent to the RFP Coordinator is acceptable. The email must identify the following for the person who will serve as the key contact for all correspondence with your company regarding this RFP:

- Name
- Address
- Phone
- Email address

A notice of intent is required in order for the City to provide interested vendors with a list of any questions received and the City's answers to those questions. Those providing a notice of intent will also be notified of any addenda that are issued. If a notice of intent is not submitted, it will be the vendor's responsibility to request a copy from the RFP Coordinator.

## Questions Regarding the RFP

Vendors who request a clarification of the RFP requirements must submit written questions to the RFP Coordinator no later than May 22, 2018 at 4 p.m. (PST). Written copies of all questions and answers will be provided to all vendors who have submitted notices of intent. Questions need to be submitted via email to [mschmitt@ci.olympia.wa.us](mailto:mschmitt@ci.olympia.wa.us). Questions about the estimated budget for this project will not be answered with specific dollar amounts.

## Proposal Submission

Proposals shall be submitted to the City by email to the RFP Coordinator at [mschmitt@ci.olympia.wa.us](mailto:mschmitt@ci.olympia.wa.us) no later than Monday, June 11, 2018 at 4pm (PST). The proposal must be in Word or PDF format.

## Proposal Organization

The proposal shall include the qualifications requested below. Information should be complete and demonstrate that the vendor can perform professional work. You are welcome to provide any other information deemed appropriate for this scope of work. The proposal shall include the following:

1. Proposal Summary
2. Scope of Services
3. Response to [Platform and Functionality](#) criteria
4. If proposing an out-of-the-box solution, response to [Solution Environment](#) criteria
5. Response to [Company and References](#) criteria
6. Response to [Implementation Methodology](#) criteria
7. Response to [Cost](#) criteria

## Evaluation

The City will consider all of the following criteria in evaluating the proposals.

- Solution and/or Mock-Up Demonstration
- Proposed Cost and Service Support
- Functional Requirements
- Implementation and Training Methodology
- Experience and References

Selected finalist(s) will present to the City, they must demonstrate the ability of the proposed solution to meet the functionality requirements. Finalist(s) should also be prepared to answer any technical questions necessary to allow the City to fully understand how the proposed solution meets the requirements.

## Public Records and Proprietary Material

Proposers should be aware that any records they submit to the City or that are used by the City even if the proposers possess the records may be public records under the Washington Public Records Act (RCW 42.56). The City must promptly disclose public records upon request unless a statute exempts them from disclosure. Proposers should also be aware that if even a portion of a record is exempt from disclosure, generally, the rest of the record must be disclosed. Exemptions, including those for trade secrets and "valuable formula," are narrow and specific. Proposers should clearly mark any record they believe is exempt from disclosure.

Upon receipt of a request for public disclosure, the City will notify the RFQ proposer of any public disclosure request for the proposer's proposal. If the proposer believes its records are exempt from disclosure, it is the proposer's sole responsibility to pursue a lawsuit under RCW 42.56.540 to enjoin disclosure. It is the proposer's discretionary decision whether to file such a lawsuit. However, if the proposer does not timely obtain and serve an injunction, the City will disclose the records, in accordance with applicable law.

# Background

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The City is currently in the process of deploying Office 365. We recently migrated our email as a first step and will be deploying OneDrive, Office Online and Mobile apps within the next few months. The City is poised to implement a digital workplace that builds upon this initial Office 365 deployment.

## Organization Overview

Olympia is the Capitol City of Washington State; in 2018, the population was estimated at over 52,000. The City is a non-Charter Code City that operates under a Council-Manager form of government.

Olympia has a seven-member [City Council](#) who sets policy by adopting codes (laws), plans, resolutions, and standards. The City Council, in turn, hires the City Manager to administer the City's day-to-day business and provide policy advice to the Council. The City Council also appoints community members to [volunteer advisory committees and commissions](#). Except for the independently elected Municipal Court Judge who is accountable to the voters, City employees are hired by and report to the City Manager, not the Council.

The City is comprised of [numerous departments](#), which provide a full range of municipal services.

The intranet will provide a point of access to the tools within our digital workplace. The digital workplace will facilitate citywide collaboration, knowledge sharing, and use of business applications and systems more effectively.

The City would like to take an agile approach to our deployment. We envision an initial pilot within the Administrative Services department. The pilot would be followed by implementation throughout the rest of the City with the vendor available to support City staff as needed.

The Administrative Services department provides several internal services to other departments and employees; it is comprised of numerous teams:

- **Fiscal Services** – provides centralized accounting services, as well as, employee payroll, benefits, and wellness.
- **Information Services** – provides centralized technology services.
- **City Clerk/Public Records** – provides information management for City records and public disclosure requests.
- **Office of Performance and Innovation** – offers expertise in aligning departments' work with the community's vision, performance, data management, and leading process improvement. (Just recently added to the department.)
- **Public Defense** – provides independent counsel to indigent parties and coordinates our Community Court.

## Current Environment

### Intranet

- Primarily built upon Microsoft Content Management Server 2002
- Some content has been developed within Dreamweaver and published to the site
- Primarily static content
- Provides links to web-based employee and business applications
- Organization based structure and navigation
- No search feature

## Office 365 and SharePoint Online

- 600 - [G3 Plan on Government Tenant](#) licenses assigned to City employees
- 92 - F1 Plan on Government Tenant licenses assigned to advisory committee and commission members
- Office 2016 installed at the desktop
  - OneDrive, Office Online and Mobile Apps scheduled for deployment within the next few months
- Exchange Online hybrid – on premise mailbox migration completed 3/31/2018
  - On premise exchange to be decommissioned by 5/31/2018
- Azure Active Directory – Hybrid Infrastructure with ADFS enabled

## Requested Services

The City has a project manager and designated staff to work on this project. The City is looking to engage with a qualified vendor to provide a solution and/or expertise to lead a pilot implementation, and then support City staff with citywide implementation of an intranet and foundation for a digital workplace.

- Provide recommended solution platform and documented architecture for how it will meet the City’s functionality requirements.
- Provide assistance with development of a Citywide Information Architecture.
- Configure and brand intranet portal.
- Assist with configuring governance rules within solution.
- Provide guidance on ways to ensure user adoption.
- Provide City staff with coaching, training, and documentation to allow them to continue to evolve the City’s digital workplace.

## Platform and Functionality

The City would like a solution built upon a SaaS out-of-the-box platform that seamlessly integrates with Office 365 **OR** built solely within Office 365/SharePoint Online.

The City desires the following functionality to be included in the solution. As part of your response, indicate whether your proposed solution meets the desired functionality by including the O365 and/or solution feature(s) name under the appropriate column. If you are proposing the use of multiple features to meet the desired functionality provide both names. For each feature listed, include how it delivers the functionality. See [Appendix A](#) for sample responses.

**Note:** Not all O365 services/features are available on the Government Tenant, [review service availability](#) and note any potential functionality limitations.

## Sharing and Collaboration

|                      | Functionality  | O365 Feature | Solution Feature |
|----------------------|--|--------------|------------------|
| Mandatory or Desired | 1-News and Notification  |              |                  |
| M                    | 1A. Ability to share news and notifications that allows audience targeting based on group membership, organization structure, and/or people attributes. Ideally with publishing approval workflow. |              |                  |
|                      | <b>Delivery Information:</b>   |              |                  |
| D                    | 1B. Ability for individual to share news updates and reports with other interested people. (Blog)  |              |                  |
|                      | <b>Delivery Information:</b>   |              |                  |

| Functionality              |  | 0365<br>Feature | Solution<br>Feature |
|----------------------------|--|-----------------|---------------------|
| Mandatory<br>or<br>Desired | 2-Collaborate – Internal to Organization   |                 |                     |
| M                          | 2A. Provide public and private spaces for teams, departments, projects, or committees to collaborate. Ability to communicate, coordinate group efforts, collaborate on documents, and share information. |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| D                          | 2B. Ability for employees to have open communications to connect, learn, and share. Including ability to like, rate, and comment on others posts. (Social Networking)                                    |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| D                          | 2C. Ability to provide recognition to people by some type of badge, ribbon, or other method.   |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| D                          | 2D. Gamification process to motivate employees to participate and engage.  |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| Mandatory<br>or<br>Desired | 3-Shared Calendars   |                 |                     |
| M                          | 3A. Ability to have shared calendars for entire City and/or individual groups for posting events and coordinate schedules. Ability to integrate these calendars within pages in varying formats.         |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |

## Content

| Functionality        |   | O365 Feature | Solution Feature |
|----------------------|---|--------------|------------------|
| Mandatory or Desired | 4-Content Management  |              |                  |
| M                    | 4A. Provide easy management of intranet content, structure, and navigation of base site.  |              |                  |
|                      | <b>Delivery Information:</b>  |              |                  |
| Mandatory or Desired | 5-Content Publishing  |              |                  |
| M                    | 5A. Provide content editing/publishing security that allows for defining roles that are assigned to groups and/or individual users. |              |                  |
|                      | <b>Delivery Information:</b>  |              |                  |
| M                    | 5B. Publishing approval workflow based on security roles.   |              |                  |
|                      | <b>Delivery Information:</b>  |              |                  |
| Mandatory or Desired | 6-Content Webparts  |              |                  |
| M                    | 6A. Easily embed O365 and/or solution features within intranet site(s).   |              |                  |
|                      | <b>Delivery Information:</b>  |              |                  |
| Mandatory or Desired | 7-Content Ranking   |              |                  |
| D                    | 7A. Ability for employees to provide feedback on intranet content to augment usage analytics.                                       |              |                  |
|                      | <b>Delivery Information:</b>  |              |                  |

## Discovery

| Functionality              |  | 0365<br>Feature | Solution<br>Feature |
|----------------------------|--|-----------------|---------------------|
| Mandatory<br>or<br>Desired | 8-Search   |                 |                     |
| M                          | 8A. Ability to find most anything, files, content, groups, and people that you have permission to see.   |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| M                          | 8B. Ability to have enhanced user profile (people) attributes to allow employees to share their expertise, experience, and interests.                          |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| Mandatory<br>or<br>Desired | 9-Personalization  |                 |                     |
| M                          | 9A. Ability for users to personalize their experience – quick access to desired tools, applications, and sites.  |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| M                          | 9B. Ability to personalize a user’s experience based on their role, department, and team association – quick access to desired tools, applications, and sites. |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| Mandatory<br>or<br>Desired | 10-Predictive  |                 |                     |
| D                          | 10A. Ability to present predictive/suggested content to employees based on their behavior and connections.   |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| Mandatory<br>or<br>Desired | 11-Knowledge   |                 |                     |
| D                          | 11A. Ability to manage and provide access to documented processes and other knowledge information. (Wikis   Knowledgebase)                                     |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |
| Mandatory<br>or<br>Desired | 12-Reporting and Analytics   |                 |                     |
| M                          | 12A. Ability to analyze performance of content and user engagement.  |                 |                     |
|                            | <b>Delivery Information:</b>   |                 |                     |

## Productivity

| Functionality        |  | 0365 Feature | Solution Feature |
|----------------------|--|--------------|------------------|
| Mandatory or Desired | 13-Document Management   |              |                  |
| M                    | 13A. Ability to share files, preview documents, perform collaborative editing, and track edits. (Document management system) |              |                  |
|                      | <b>Delivery Information:</b>   |              |                  |
| Mandatory or Desired | 14-Workflow and E-Forms  |              |                  |
| M                    | 14A. Ability to create and manage automated workflow with digital forms and signature/approval.                              |              |                  |
|                      | <b>Delivery Information:</b>   |              |                  |
| Mandatory or Desired | 15-Task Management   |              |                  |
| D                    | 15A. Ability to create, assign, prioritize and manage tasks.   |              |                  |
|                      | <b>Delivery Information:</b>   |              |                  |

## Other

| Functionality        |  | Available?   Describe |
|----------------------|--|-----------------------|
| Mandatory or Desired | 16-Security and Governance   |                       |
| M                    | 16A. Security model that allows for governance at multiple levels; department, team/group, and individual.   |                       |
| M                    | 16B. Security model that allows for granular permissions down to feature level.  |                       |
| D                    | 16C. Ability to enable governance rules that support an established governance model. (For example: Approval workflow for team sites that includes request criteria) |                       |
| Mandatory or Desired | 17-Integration   |                       |
| M                    | 17A. Seamless user integration via Active Directory Federated Services (ADFS).   |                       |
| M                    | 17B. Seamless integration with Office 365 for emailing, calendaring, and productivity tools (Word, Excel, etc.).   |                       |

| Functionality        |  | Available?   Describe |
|----------------------|--|-----------------------|
| D                    | 17C. Open framework and/or application program interface (API) available for developing interfaces with City business solutions. |                       |
| Mandatory or Desired | 18-Design  |                       |
| D                    | 18A. Simple branding and styling administration.   |                       |
| D                    | 18B. Ability to create brand/style templates for specific types of sites.  |                       |
| M                    | 18C. Responsive design and/or mobile apps for access via any device.   |                       |

## Solution Environment

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If proposing an out-of-the-box solution, provide responds to the following questions.

### General

1. Does your solution stand-alone or require another enterprise application to function?
2. Do you have service level agreements for performance and availability of your solution? Please provide details.
3. How often are upgrades made to your solution? Please include a solution roadmap.
4. How does your solution align with O365 and SharePoint Online platform changes?
5. What is the timing and method for notifications related to service outages and/or upgrades?

### Content/Data

1. Where is content/data within your solution stored, within our SharePoint tenant or elsewhere?
2. If data/content is stored outside of our tenant:
  - a. What are your data backup and redundancy standards for preventing data loss?
  - b. Do you have a documented data security policy? Please provide details.
  - c. Does your hosting agreement include language that the customer (City) owns their data?
  - d. Does your solution allow for defining data retention with purging options?
  - e. What data exiting strategies do you provide at termination of subscription service?

## Company and References

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### Relevant Firm Experience

Provide company contact information, how long you have been in business, and what solutions and services you provide. Identify and briefly describe similar implementations performed in the last three years.

### Microsoft Partnership

Provide information related to your current relationship (partnership level) with Microsoft, including which competency and/or solutions.

## Client References

Provide a minimum of three client references with the following information for which you have implemented your intranet solution and/or services. If possible, include one government agency reference.

- Organization Name
- Address
- Contact Person
  - Name
  - Title
  - Phone
  - Email

## Implementation Methodology

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### Project and Timeline

Provide a description of your typical project methodology and timeline for implementation.

### Project Staff

Provide the following details for the key project staff to be assigned to this proposed implementation:

- Position in company
- Length of time in position
- Length of time with company
- Project position and responsibility
- Skills and qualifications for project position
- Previous similar implementation experience

### Training and Support

1. Describe your training model for administrators, editors, and end users.
2. Describe your approach to encourage user adoption.
3. Describe your support model during and following implementation.

## Costs

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### Licensing

If proposing an out-of-the-box solution, provide your licensing models and/or pricing structures for your solution. Assume a 600-user count.

### Implementation

Provide details of recommended services, with itemized cost, for implementation services.

## Appendix A - Sample Responses

| Functionality   | O365 Feature                          | Solution Feature |
|---|---------------------------------------|------------------|
| <b>News and Notification</b>  |                                       |                  |
| Ability to share news and notifications that allows audience targeting based on group membership, organization structure, and/or people attributes.   | -News Web Part<br>-Team Announcements |                  |
| <b>Delivery Information:</b><br>-A News web part can be added to a page then Target Audience(s) set for the web part, the web part will only appear to the people who are members of the audiences specified.<br>-Within a Team site the announcements feature can be used to share news within the team. |                                       |                  |
| <b>News and Notification</b>  |                                       |                  |
| Ability to share news and notifications that allows audience targeting based on group membership, organization structure, and/or people attributes.   |                                       | NewsFlow**       |
| <b>Delivery Information:</b><br>The NewsFlow feature can be embedded within pages and allows targeting to specific departments and groups.  |                                       |                  |
| <b>People Directory</b>   |                                       |                  |
| People directory built upon and/or integrated/synced with Azure AD. Utilizes a person's organizational attributes and extended attributes like skills and knowledge to easily search and find the right person.   | Delve                                 | OurPeople**      |
| <b>Delivery Information:</b><br>The OurPeople feature provides a directory of all employees with organization chart functionality, allows employees to update their profile with skills and knowledge. This feature utilizes the AD attributes and Delve.   |                                       |                  |

\*\* These are fictitious feature names used for purposes of example only.