



FAIRFAX COUNTY WATER AUTHORITY
8570 Executive Park Avenue, Fairfax, Virginia 22031-2218
www.fairfaxwater.org

REQUEST FOR PROPOSAL

Number: 17-79

Title: SharePoint - Intranet Architecture and Content Migration

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Proposals to Be Delivered to: Procurement Department
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TABLE OF CONTENTS

I.	INTRODUCTION TO FW & PROJECT BACKGROUND.....	4
	1.1 INTRODUCTION TO FAIRFAX WATER.....	4
	1.2 BACKGROUND.....	5
	1.2.1 Business Goals.....	5
	1.2.2 Governance Structure.....	6
	1.2.3 Stakeholder Groups.....	7
	1.2.4 Data Sources & Systems.....	8
II.	PROJECT SCOPE OF SERVICES.....	11
	2.1 GENERAL.....	11
	2.2 SCOPE OF WORK.....	11
	2.2.1 Business Scenarios.....	11
	2.3 MANAGEMENT.....	14
	2.4 DISCOVERY OF SOLUTION.....	15
	2.4.1 Governance Plan.....	15
	2.4.2 Information Architecture.....	16
	2.4.3 Search.....	17
	2.4.4 Branding.....	17
	2.4.5 Content.....	18
	2.4.6 User Profiles.....	20
	2.5 EXECUTION OF SOLUTION.....	20
	2.5.1 Environment Readiness.....	20
	2.5.2 Implementation.....	20
	2.5.3 Migration.....	21
	2.5.4 Verification & Validation.....	22
	2.5.5 Training.....	22
	2.6 FUTURE ROADMAP DISCOVERY.....	22
	2.7 SCOPE OF WORK COMPONENTS.....	25
	2.7.1 Solution Experience.....	25
	2.7.2 Implementation Plan and Methodology.....	25
	2.7.3 Project Organization and Staffing.....	25
III.	INSTRUCTIONS TO OFFERORS.....	27
	3.1 ADDITIONAL INFORMATION.....	27
	3.2 TRADE SECRETS OR PROPRIETARY INFORMATION.....	27
	3.3 DEBARMENT STATUS.....	27
	3.4 CONFLICT OF INTEREST STATEMENT.....	27
	3.5 QUALIFICATION OF OFFERORS.....	28
	3.6 OFFEROR INVESTIGATIONS.....	28
	3.7 COMPETITIVE NEGOTIATION FOR NON-PROFESSIONAL SERVICES.....	28
	3.8 AUTHORITY TO TRANSACT BUSINESS.....	28
	3.9 INSURANCE REQUIREMENTS.....	28
	3.10 INTEREST IN MORE THAN ONE PROPOSAL, AND COLLUSION.....	29
	3.11 PROPOSAL WITHDRAWAL.....	29
	3.12 OPTIONAL RIDER CLAUSE.....	29
	3.13 CONTRACT AWARD IS IN THE BEST INTEREST.....	29
	3.14 NOTICE OF DECISION TO AWARD.....	29
IV.	PROPOSAL REQUIREMENTS.....	30

4.1	GENERAL	30
4.2	EXPENSES INCURRED IN PREPARING PROPOSAL	30
4.3	PROPOSAL FORM SUBMISSION.....	30
4.4	INCOMPLETE DOCUMENTS.....	30
4.5	PROPOSAL STANDARDS	31
4.6	PROPOSAL SUBMITTAL ELEMENTS.....	31
I.	PROPOSAL FORM	31
II.	EXECUTIVE SUMMARY	31
III.	SOLUTION EXPERIENCE.....	31
IV.	IMPLEMENTATION PLAN AND METHODOLOGY.....	33
V.	PROJECT ORGANIZATION AND STAFFING	35
VI.	PRICING.....	36
VII.	REFERENCES	37
VIII.	FINANCIAL STABILITY	37
V.	EVALUATION PROCESS.....	38
VI.	RFP ATTACHMENTS.....	39

I. INTRODUCTION TO FW & PROJECT BACKGROUND

Fairfax Water (“FW”) is soliciting proposals for the implementation of a new intranet and migration of existing project and team sites to an Office 365 SharePoint Online platform. The intranet and migration solution hereafter sought in this solicitation shall be referred to as the “Solution” or “System”.

FW is soliciting proposals from offerors having experience and qualifications in the area identified in this solicitation. Proposals shall contain evidence of the offeror’s experience and abilities in the specified area and other disciplines directly related to the proposed work.

1.1 INTRODUCTION TO FAIRFAX WATER

Fairfax Water’s mission is to provide its customers with reliable and abundant water of exceptional quality at a reasonable price. FW aspires to remain a respected industry leader, upholding its customers’ trust by providing water of exceptional quality and reliability, at a reasonable price, while supporting the high quality of life and economic vitality of the region.

Chartered in 1957 by the Virginia State Corporation Commission as a public, non-profit water utility, Fairfax Water is governed by a 10-member Board of Directors composed of Fairfax County citizens and appointed by the elected Fairfax County Board of Supervisors. A general manager, supported by a staff of 442 water professionals, manages the day-to-day operations of Fairfax Water.

Fairfax Water has one of the lowest commodity rates in the Washington metropolitan region and is one of only a handful of water utilities in the country to receive an AAA rating from the top three financial rating services.

The Virginia Department of Health regulates Fairfax Water’s water quality according to regulations established by the Environmental Protection Agency and based on the Safe Drinking Water Act passed by the U.S. Congress.

FW is Virginia’s largest water utility and one of the 25 largest water utilities in the country, serving one out of every five Virginians who obtain their water from public utilities. Nearly two million people in the Northern Virginia communities of Fairfax, Loudoun, Prince William, Fort Belvoir, Herndon, Dulles, Vienna, Alexandria, Falls Church, and Fairfax City depend on Fairfax Water for superior drinking water.

FW provides water that is treated at four different locations. FW owns and operates the two largest water treatment facilities in Virginia with an average daily water production of 163 million gallons and combined maximum capacity of 376 million gallons per day. The James J. Corbalis Jr. treatment plant is at the northern tip of Fairfax County and the Frederick P. Griffith Jr. treatment plant is on the southern border of Fairfax County.

FW also purchases water from the McMillan and Dalecarlia treatment plants in Washington DC. They are part of the Washington Aqueduct, owned and operated by the U.S. Army Corps of Engineers.

FW draws raw water from two primary sources: the Potomac River and the Occoquan Reservoir, which is fed by the Occoquan River. The four treatment facilities feed an interconnected distribution system that includes 3,971 miles of water mains, 28,827 fire hydrants, and 97,683 valves.

Additional FW information is available at www.fairfaxwater.org.

1.2 BACKGROUND

FW would like to establish a new intranet on the Microsoft 365 SharePoint (“SP”) Online platform with a robust information architecture and the migration of content from the current intranet site (<http://FWCAWeb>) and existing Windows SharePoint Services (WSS) 2.0, ad hoc SharePoint Online, HTML Intranet, inclusive of links to files on the network drive.

The Solution to be procured through this solicitation is a means to solve multiple content and document management challenges. For example, the current legacy intranet lacks usability and findability capabilities across the content. Without a clearly defined information architecture (site collections, site navigation and metadata) staff face limitations in effectively finding information. Overall, a governance plan with guidelines and policies on the intranet and private sites need to be established.

In addition, the current intranet requires content management updates to department intranet pages to be managed by Public Affairs; it is required that the Solution be intuitive and usable so staff can make self-service content changes. In order for self-service model to succeed the business area who will be managing content going forward will require adequate training and change management support.

Furthermore, there are limited document management guidelines and system capabilities that have led to multiple versions of documents being stored on local hard-drives, shared drives and shared via email.

Currently, the system does not provide sufficient online capabilities. These limitations result in staff printing documents instead of accessing them online through a device. Or staff are unable to access information when at an off-site location.

In addition, staff are at varying degrees of expertise with SharePoint. Many staff are using older on-premises versions. Existing content needs to be migrated and tagged to reflect the new architecture and metadata, and project and team site governance and training needs to be established to address adoption and usability gaps across all the organization’s Divisions.

1.2.1 Business Goals

FW has identified a set of business goals for the intranet and content migration Solution. The goals below align to the scope of work expected of the offeror’s Solution. The Solution should meet these goals while minimizing customizations and maximizing SharePoint Online capabilities. In addition, the Solution should stay in congruent with Microsoft Office 365 Roadmap and release functionality.

Category	Business Goal
Structure	Fully compatible solution with minimized customizations and maximized out-of-box SharePoint Online capabilities.
	Consolidated, consistent and cohesive repository for business use.
	Establish, adopt, and implement a governance throughout the organization.
Findability / Usability	Provide a user friendly and sustainable new intranet that staff will utilize.
	Establish a usable and searchable information architecture that provides relevant results (Site Map, Content Types, and Metadata).

	Establish Help & Support and train staff to know where to obtain support as end users, site owners or site contributors.
Brand	Establish a consistent look and feel that conforms to the new Internet brand guidelines.
Content	Enroll business users in the day-to-day content management activities within the SharePoint environment (self-service).
	Migrate the Fairfax Water Intranet current and relevant HTML and network drive content (PDF, Word and other document types) to SharePoint Online.
	Migrate Fairfax Water's existing SharePoint Environment (Existing ad hoc SharePoint Online & Windows SharePoint Services 2.0) current and relevant content therein to the new SharePoint Online architecture.
	FW's Information Technology Department has a specific goal to shut down the WSS 2.0 environment quickly yet non-disruptively.
	Version control capabilities to reduce duplication of documents.
Roadmap	Identify and prioritize the forms to be automated.
	Better understanding of what business scenarios are best met with the SharePoint Online technology.
	Understand SharePoint Online records management capabilities and options for their use, to support FW compliance with, but not limited to, the Virginia Public Records Act and Library of Virginia records retention and disposition schedules.

1.2.2 Governance Structure

FW has established a governance structure to provide oversight, direction and business and information technology subject-matter-expertise to the engagement. There are three tiers to the structure. The offeror will interact with each tiered level throughout the engagement. Below are the tiers and associated charters.

Tier	Charter
Governance Committee	The Governance Committee is composed of senior executives accountable for advancing business process improvements at Fairfax Water. It establishes the vision for the platforms, sets direction, makes decisions, resolves issues, and manages scope. It leads intra-company cooperation, defines policy/guidelines, and acts as an advocate for change. It facilitates the leverage of resources and assets from their departments and maintains focus on achieving business results.
Core Team	Composed of representatives from each Division or Department and key enablement partners. Responsible for managing and delivering the project within the scope and schedule. Focused on the achievement of the project deliverables and milestones, resolves issues, manages scope, and addresses resources and assets needs within a business area for the benefit of the project. The main interface between the project team, organization, and outside engagement partner organizations.
Content Coordinator	Composed of representatives from each Division or Department with an intranet presence. Accountable and responsible for managing and delivering the intranet content . Focused on content inventory, coordination of content migration, content metadata and tagging, writing and obtaining approval of new intranet content. It is responsible for achievement of the project deliverables and milestones, issue resolution, user acceptance testing for quality delivery for the benefit of the project.

1.2.3 Stakeholder Groups

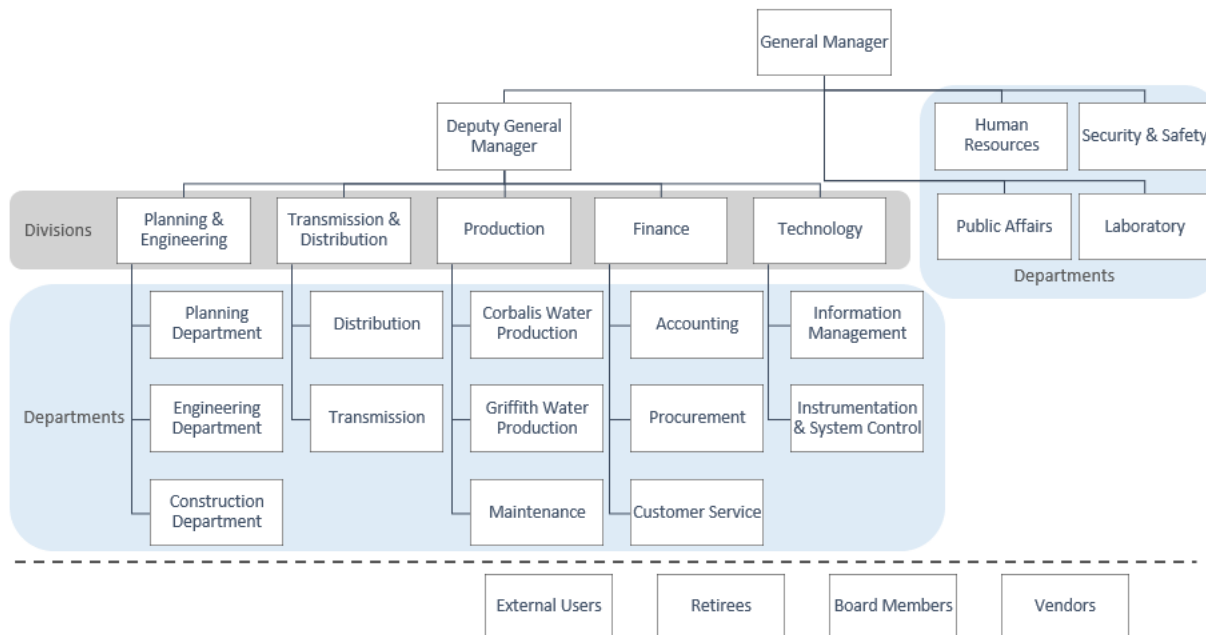
The SP Online platform shall service a group of stakeholders who are mainly made up of FW employees. Below is a list of those who are currently anticipated to use the solution, but FW reserves the right to add and/or remove potential stakeholder groups based on the functionality proposed by offerors to solve current challenges.

The following are currently identified stakeholder groups:

1. Fairfax Water Employees: Most of the end users of the solution will be internal FW employees who will all have access to the intranet and varying degrees of access to division, department and project sites.
2. External Users: There are some end users who will be external to FW who will need a secure location to access FW reports, specifically water lab reports.
3. Retirees: FW provides support to prior employees. The retiree end users will use a secure and private location to obtain information from Human Resources.
4. Board Members: The FW Board Members will require access to previous and current board books stored in a secure site location.
5. Vendors: FW works with a variety of vendors who may need access to (a) secure site(s).

These stakeholder groups are organized both internally and externally. The internal employees fall within the following organizational structure with five Divisions and their respective Departments reporting to the Deputy General Manager and four Departments reporting directly to the General Manager. The offeror will work with stakeholders within each of these Divisions and Departments to discover and execute the implementation of the Solution.

The offeror will gather requirements during discovery of future phases for the external users, retirees,



Board Members, and Vendors to determine key needs. The Solution should include the design and architecture to accommodate these stakeholders.

Figure 2: Fairfax Water Stakeholder Groups

1.2.4 Data Sources & Systems

FW has multiple existing data sources and systems that will be a part of Solution and/or anticipated future phases. Below is a table providing context of the existing systems. The Solution shall migrate existing content and data from various sources. Given the volume of existing content, the content migration strategy will be foundational to the project and must scale and adapt well with limited effort to a broad variety and volume of content items. Assumptions regarding the content profile are captured herein; however, offerors are advised to take into consideration the possibility the as-is content footprint and assumptions thereto are subject to change pending discovery and advice with respect to content migration strategy.

#	System Name	Description
1.	Microsoft Windows Server 2003, Standard Edition	<p>An existing Windows SharePoint Services 2.0 solution used for both FW intranet and private sites.</p> <p><u>Operating System (OS) Version:</u> 5.2.3790 Service Pack 2 Build 3790 <u>System Type:</u> X86-based PC <u>Processor(s):</u> 1 Processor(s) Installed. [01]: x86 Family 6 Model 62 Stepping 4 GenuineIntel ~2199 Mhz <u>BIOS Version:</u> INTEL – 6040000 <u>IIS Version:</u> IIS V6.0 <u>SQL Server:</u> Microsoft SQL Server 2005 - 9.00.3077.00 (Intel X86); Standard Edition on Windows NT 5.2 (Build 3790: Service Pack 2).</p> <p><u>Content Information:</u> Size: 16,849 MB Number of Sites: 83 Number of Sites Used in Past 6 months: 29</p> <p><u>Assumptions:</u></p> <ul style="list-style-type: none"> • 90% of the existing content will be migrated to a new storage repository and/or signed off for records retention to delete. • 10% of the existing content will be restructured and migrated to the new SharePoint Online Solution.
2.	Microsoft Enterprise 365 SharePoint Online	<p>Ad hoc sites that have been established without a framework and need to be migrated to the new Solution architecture.</p> <p><u>Content Information:</u> Size: 5.44 GB Number of Sites: 16</p> <p><u>Assumptions:</u></p> <ul style="list-style-type: none"> • 10% of the existing content will be migrated to a new storage repository and/or signed off for records retention to delete. • 90% of the existing content will be restructured and migrated to the new SharePoint Online architectural solution.
3.	Intranet (fcwaweb)	<p>The existing Intranet that resides on an HTML front end with links within the HTML pages, to WSS 2.0 sites and the FW network drive.</p>

		<p><u>Content Information:</u> Size: 5.86 GB Files: 98,883 Folders: 8,237 File Types:</p> <ul style="list-style-type: none"> • Accounting Reports • Human Resource Forms and Information • Operation & Maintenance Manuals • Facility As-Builts • Valve As-Builts (Stattic Files) <p>File Formats: Microsoft Word documents, Outlook files, PDFs, CAD drawings, TIFF JPEG, DWF</p> <p><u>Assumptions:</u></p> <ul style="list-style-type: none"> • 3% of the existing content and files will be migrated to SharePoint Online. • Files on HTML pages not migrated to SharePoint Online will be moved to a separate repository. • Intranet files that reside in WSS 2.0 will be migrated based on WSS 2.0 decisions. • Existing inbound hyperlinks for all migrated content assets will be updated to point to their new location. • Intranet files to the FW network drive not migrated to SharePoint Online will remain in the network drive repository.
4.	SAP	<p>FW utilizes SAP as its Enterprise Resource Planning system including HR functions. Consequently, SAP is the master database for employee information.</p> <p>Appendix I provides a high-level summary of the FW SAP platform and its modules and applications.</p>
5.	Archives	<p>FW's repository of completed Project and Subdivision records. The P&E Archives contains records created during the planning, design, and construction of Fairfax Water above and below ground Projects and Subdivision records from outside contractors and agencies which impact our underground water system. The P&E Archives are the permanent records of the Project or Subdivision when it was built.</p> <p><u>Content Information:</u> Size: 356,870 File Formats: Microsoft Word documents, Outlook files, PDFs, CAD drawings, TIFF and JPEG</p> <p><u>Assumptions:</u></p> <ul style="list-style-type: none"> • Archive files will not be migrated to SharePoint Online for the Solution.

		<ul style="list-style-type: none">• Offeror will assess and understand the Archives to define a broad FW information architecture and search indexing capabilities.
6.	ESRI GIS	<p>FW utilizes the ESRI geographic information system (GIS) that lets us visualize, question, analyze, and interpret data to understand relationships, patterns, and trends of FW activities.</p> <p>Appendix J provides reference materials for the FW ESRI GIS.</p>

II. PROJECT SCOPE OF SERVICES

2.1 GENERAL

The purpose of this solicitation and resulting contract is to obtain services of a qualified offeror to provide a SharePoint Online solution for a new intranet architecture, content migration and robust search experience. FW expects the offeror to provide the design and implementation of the Solution. FW anticipates a multi-phased approach over multiple years to meet short and long-term business objectives on the SP Online platform.

2.2 SCOPE OF WORK

The scope of the envisioned contract includes the following areas:

- Management: The oversight, direction and strategic insight on the Solution.
- Discovery of Solution: The analysis of the current state and requirements and design for the Solution.
 - Governance Plan
 - Information Architecture
 - Branding
 - Content
 - User Profiles
- Execution of Solution: The executed Solution.
 - Environment Readiness
 - Implementation
 - Migration
 - Verification & Validation
 - Training
- Future Roadmap Discovery: The collective insight from discovery and analysis to establish a multi-phased roadmap.

2.2.1 Business Scenarios

The below table lists some of the high-level business needs that FW staff have identified for the Solution implementation that should be considered when responding to the RFP.

- All Areas – This label indicates that all areas of the solution apply: All Staff Intranet, Private Sites and User Profiles.
- All Staff Intranet – This area includes the Intranet, or organizational facing pages, that all FW internal staff can access, including the Home Page, each Division and Department pages.
- Private Sites – This includes all private team and project collaboration sites/sub-sites that only specified FW staff can access.
- My Profile – This is the personal profile information specific to each user.
- Other – These are business scenarios within FW that do not fall specifically within the above categories.

#	Area(s)	Business Scenario
1	✓ All Areas	Access Anywhere <ul style="list-style-type: none"> • A usable and easily accessible solution via a desktop, tablet and mobile devices

#	Area(s)	Business Scenario
2		<p>Governance</p> <ul style="list-style-type: none"> Establish governance for the creating and maintaining the intranet, private sites and user profiles.
3		<p>Search & Search Results</p> <ul style="list-style-type: none"> Search capabilities available to users from all intranet pages, user profiles and private sites. Search results: <ul style="list-style-type: none"> Search initiated from the Intranet Home to provide search results from across the Intranet sites and pages, user profiles and private sites that user has access. Search initiated from an Intranet Division, Department or sub-site or page and Private site to provide search results from that site. Full file search for all supported content types including Office documents (Word, PowerPoint, Excel), PDFs, OneNote sections, content from SharePoint Sites (for example tasks and pages), images (for example jpg and png files), and videos stored in O365 Video portal. Search for synonyms and key matches. Search Index <ul style="list-style-type: none"> Establish an index of FW custom metadata and key information. Usable search results that combine out-of-box search results with FW custom indexed results from a "both" or "and". Search refinements including but not limited to faceted search navigation options to drill down by users, metadata, file types, timestamps. Ability to index files that are linked from SharePoint Reporting on search activities by intranet site, user profile and/or SharePoint Sites, including what is being searched, number of searches conducted, timestamps of each search, and user actions from a search result.
4		<p>Security</p> <ul style="list-style-type: none"> Automatically apply site security to sub-sites and pages Management of site security by site owners
5		<p>Manage Sites / Sub-Sites</p> <ul style="list-style-type: none"> Site owner capabilities to manage sites and/or sub-sites, including create Auditing and deletion procedures for sites and/or sub-sites Integration with SAP to pull data on new hire and recent retirees for an employee dashboard.
6	<ul style="list-style-type: none"> ✓ All Staff Intranet ✓ Private Sites 	<p>Document Management</p> <ul style="list-style-type: none"> Manage and co-author documents Version control
7		<p>Manage Headlines, News and/or Announcements</p> <ul style="list-style-type: none"> Manage the news and announcements displayed Select content from a Division/Department site to "feature" on a separate site or page (i.e. Home or Division) Display multiple rotating items Set automated notifications to end users of important headline, news or announcement

#	Area(s)	Business Scenario	
8	✓ All Staff Intranet	<p>Images & Icons</p> <ul style="list-style-type: none"> • Manage the images displayed • Manage the size of the images displayed • Manage text or headings with an image 	
9		<p>Media</p> <ul style="list-style-type: none"> • Embed and display photos and/or videos, including in O365 Videos 	
10		<p>Calendars</p> <ul style="list-style-type: none"> • Display group outlook calendar(s) within a site or sub-site (i.e. Corporate Calendar) • Send automated notifications to the group or a sub-set of the group • Manage multiple calendars within a site or sub-site 	
11		<p>Reporting</p> <ul style="list-style-type: none"> • Analytics of user access and usage of pages, links and documents • Full audit trail capabilities on user actions 	
12		<p>Metadata</p> <ul style="list-style-type: none"> • Automatically apply metadata to files created/uploaded within a site • Manually apply metadata to files created/uploaded within a site • Define and create metadata to be applied • Ability to add/apply metadata "en masse" (batch selection and application) would be "nice-to-have" for the larger volume areas of the site. 	
13		<p>Applications (i.e. Phone Directory, Weather)</p> <ul style="list-style-type: none"> • Manage applications to be displayed • Imbed/Add Outlook group calendars and/or events • Manage the view and data displayed 	
14		<p>Who to Contact / Help</p> <ul style="list-style-type: none"> • End users can easily identify and contact site owners • End users can easily identify and contact Help and Support 	
15		<p>Quick links</p> <ul style="list-style-type: none"> • Manage the quick links displayed • Link to other intranet pages and external sites <p>Define whether the link action, including opening a new browser</p>	
16		<p>Notifications</p> <ul style="list-style-type: none"> • Site Owners at the Intranet Home page to have ability to send notifications / alerts • Users have ability to opt-in to notifications / alerts based on permission structure across the environment 	
17			<p>Feedback</p> <ul style="list-style-type: none"> • Provide end users capability to easily provide feedback • Gather feedback in an organized method for managing and tracking, including establishing lists and/or a system integration • Send automated notifications to end users when feedback is submitted
18			<p>Forms</p> <ul style="list-style-type: none"> • Automate form for online entry and submission
19			<p>Workflows</p> <ul style="list-style-type: none"> • Automate workflow for managing and tracking processes

#	Area(s)	Business Scenario
20		Task List or Planner <ul style="list-style-type: none"> • Create and manage a light weight schedule with assigned tasks
21	✓ Private Sites	Navigation <ul style="list-style-type: none"> • Site owners can manage the navigation within their site and/or sub-site
22		Branding <ul style="list-style-type: none"> • Flexibility to adjust and manage the branding and style of the site or sub/site
23	✓ My Profiles	System Integration <ul style="list-style-type: none"> • Access and map data fields from SAP to SharePoint Online
24		Information Technology Management <ul style="list-style-type: none"> • IT to execute fine-grain (single item) and complex restores without the use of PowerShell scripts or advanced technical support
25	✓ Other	Public Folder Migration <ul style="list-style-type: none"> • Migrate some existing public folders to SharePoint Online
26		Records Retention <ul style="list-style-type: none"> • Identify records retention needs and requirements

2.3 MANAGEMENT

The offeror shall be responsible for managing the offeror’s team and activities and collaborating with FW on the Solution. The offeror shall provide a project manager as the point-of-contact for the project who can respond and has authority to represent the offeror and an enterprise solutions architect who can address a holistic enterprise solution.

Activity	Description	Deliverable(s)
Manage the Project	<ul style="list-style-type: none"> • Manage the offeror activities and resources, including 3rd party or contracted resources. • Provided detailed schedule of offeror activities and expected/dependency FW activities. • Facilitate and provide routine status reports including budgeting, pending decisions, dependencies, schedule, overall status of activities, issues and risks. • Facilitate weekly status calls with updated detailed project schedule, issues, risks, budget, and action items. 	Detailed Project Schedule Status Reports
Recommendations to Measure Results of Business Goals	<ul style="list-style-type: none"> • Provide recommendations and descriptions of each method (out-of-box reporting, customizations and manual analysis) to gather, interpret and report measure of obtaining business results. 	Recommendations to Measure Business Results
Enterprise Solutions	<ul style="list-style-type: none"> • Provide an enterprise solution diagram and recommendations for the Solution and longer-term goals of FW, including system integration needs. • Act as a SharePoint architecture subject matter expertise with integration points with SAP and other systems. 	Solution Diagram and Recommendations

	<ul style="list-style-type: none"> • Ability to discern what solution is best for a given business scenario. 	
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2.4 DISCOVERY OF SOLUTION

The offeror shall be responsible for facilitating the discovery process in conjunction with FW’s division and departments and/or as directed by FW to determine specific needs to meet the business goals of the Solution.

2.4.1 Governance Plan

The offeror shall facilitate and provide guidance around the solution governance processes, policies and guidelines for sustainability of the solution. The offeror shall perform the following activities to complete the deliverables.

Activity	Description	Deliverable(s)
Define the Governance Plan	<ul style="list-style-type: none"> • Facilitate and meet with stakeholders to understand FW specific governance needs and vision. • Document and define a Solution with “on-demand” governance policies and guidelines. • Identify the stakeholders and their vision of the Solution and future phases, including internal users, external users, Retirees, Board Members, and Vendors. • Identify and recommend corporate policies for information management usage. • Identify the following roles: <ul style="list-style-type: none"> ○ site owners (responsible for managing site access/permission subsites, basic support tasks) ○ site contributors (who will have access to create/update/delete content on the site) ○ site visitors (who will have access to only view site contents) • Demonstrate roles and how they play a role in the overall solution. • Define the maintenance, auditing, and non-compliance procedures for long term governance adherence to the solution (i.e. intranet updates, project site archiving). • Define the access restrictions and group permissions, including external and anonymous access. • Define the types of information that needs to be tracked at the site collection and page levels. • Define the processes to provision a new site collection, request a site or page. • Provide guidance on best scenarios for using SharePoint Online versus other Office 365 tools. • Present, facilitate review and incorporate feedback of draft governance plans and recommendations of on-demand solutions. 	<p>Governance Plan</p> <p>Recommendations for Implementation of On-Demand Solution</p>

	<ul style="list-style-type: none"> • Present final governance plan for Governance Committee approval. 	
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2.4.2 Information Architecture

The offeror will facilitate working sessions with the Divisions and Departments to understand their perspectives and needs for establishing an enterprise information architecture for the Solution that maximizes the SharePoint Online capabilities and minimizes customizations.

Activity	Description	Deliverable(s)
Define the Information Architecture	<ul style="list-style-type: none"> • Assess the existing SharePoint, network drive and archive structures to gain insight and understanding of the existing structures, content types and metadata. • Facilitate Division and Department sessions to define the information architecture, including but not limited to the site map, metadata and content types. • Gather during the Division and Department sessions the requirements for external user, Retiree, Board Member and Vendor stakeholders. • Facilitate and guide all Division and Department representatives to an enterprise-wide, user-centered, solution to meet long term FW and end user needs, including minimizing customized solutions and maximizing out-of-box SharePoint Online capabilities. • Document FW specific information architecture, including but not limited to: <ul style="list-style-type: none"> ○ mapping existing SharePoint and intranet structures; ○ identify opportunities to improve content and document management; ○ define managed metadata and custom column metadata; ○ site security and compliance requirements; ○ process re-engineering opportunities or requirements as it relates to the future Solution or usage of SharePoint; ○ Intranet home page site map and navigation; ○ Intranet home page elements; ○ Intranet Division elements; ○ Intranet Department elements; • Present, facilitate review and incorporate feedback of information architecture, identified requirements and recommendations. • Present final information architecture and recommendations to the Governance Committee for approval. 	<p>Information Architecture</p> <p>Recommendations specific to FW's Solution based on discovery analysis and findings</p> <p>Recommended revisions to Governance Plan</p>

Gather Detailed Requirements	<ul style="list-style-type: none"> Document and validate requirements for the Solution to confirm understanding and agreement on priorities for the Solution and future phases. 	Detailed Intranet and Site Requirements
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2.4.3 Search

Activity	Description	Deliverable(s)
Define Plan for Search	<ul style="list-style-type: none"> Assess the existing FW repositories. Define a plan to provide FW with a robust search experience, including but not limited to: <ul style="list-style-type: none"> how to establish an index of FW custom metadata and key information; How to combine SP Online out-of-box search results with FW custom indexed results; What migration activities need to be enhanced to maximize search results; What out-of-the-box and custom refiners are recommended; What are the roles and responsibilities of Offeror to implement search plan; What governance needs to be established; and What roles are required to maintain and fine tune search results in future phases. 	Search Plan

2.4.4 Branding

The offeror shall provide a SharePoint Online branding Solution for a desktop, tablet and mobile device with limited to no customizations.

Activity	Description	Deliverable(s)
Describe Branding Method	<ul style="list-style-type: none"> Establish and document a plan and process for branding the Solution. Conduct a kickoff meeting to inform FW staff of the branding plan including but not limited to the process, roles and responsibilities, milestones, and samples of out-of-box branding versus required customizations. 	Branding Plan Branding Kickoff Presentation
Define the Branding Requirements	<ul style="list-style-type: none"> Facilitate meetings with FW staff to define the requirements for branding the Intranet and team/project sites. Assess the FW branding requirements and communicate what can be achieved out-of-box versus customizations. Draft branding requirements and verify accuracy with FW staff. Present, facilitate review and incorporate feedback of branding requirements. Present final branding requirements for approval. 	Branding Requirements

Draw the Solution Design	<ul style="list-style-type: none"> Facilitate meetings with FW staff to define the home, division, department and team/project site designs. Present, facilitate review and incorporate feedback of wireframes. Present final wireframes for approval. 	<p>Draft Wireframes</p> <p>Final Wireframes</p>
Design the Brand Style	<ul style="list-style-type: none"> Facilitate meetings with FW staff to define the design composition and incorporate FW branding requirements. Present, facilitate review and incorporate feedback of design compositions. Present final design compositions and required customizations for approval. 	<p>Draft Design Compositions</p> <p>Final Design Composition</p>
Design the Solution Layouts	<ul style="list-style-type: none"> Facilitate meetings with FW staff to define the home, division, department and team/project site layouts. Present, facilitate review and incorporate feedback of the layouts. Present final page layouts to the Governance Committee for approval. Recommend intranet content to be created to address gaps between the existing intranet and Solution. 	<p>Intranet Home Page Layouts</p> <p>Intranet Division Layouts</p> <p>Intranet Department Layouts</p> <p>Project Site Layout</p> <p>Content creation recommendations</p>

2.4.5 Content

The offeror shall assess and manage the content and data migration activities of the Solution. The offeror shall describe the content plan and ensure that that content and data readiness for migration, then validate successful migration.

Activity	Description	Deliverable
Describe Content Strategy	<ul style="list-style-type: none"> Assess the existing content and data on the Intranet, network drives, and existing Windows SharePoint Services (WSS) 2.0 and SharePoint Online sites. Conduct a technical content migration workshop to understand the depth and breadth of content, usage, retention requirements, etc. to determine a content strategy. Provide expertise and best practices for establishing content migration guidelines and recommendations including but not limited to: <ul style="list-style-type: none"> what data should be restructured and migrated to SharePoint Online; where and how data not migrated to SharePoint Online should be migrated, especially off WSS 2.0; what content types, file types and sizes cannot be migrated; where data should be migrated if not to SP Online; how to deal with “versionitis”; 	<p>Content Strategy</p> <p>Content Migration Guidelines and Recommendations</p>

	<ul style="list-style-type: none"> ○ how to reduce content volume for migration as well as the overall content footprint; ○ how to migrate data stored in software; ○ how to maximize search results for end users; and ○ how to migrate data with legacy hyperlinks and how to set up / replace with new locations (i.e. update bookmarks, spreadsheets to new architecture, or a database re-direct). ● All business areas need to be enrolled in the self-service model. 	
Migration Plan	<ul style="list-style-type: none"> ● Based on the content strategy, document and define the migration plan including but not limited to: <ul style="list-style-type: none"> ○ the migration software offeror provides; ○ approach for preparing and verifying content and data for automated versus manual migration; ○ agreement on end migration repository (SP Online or other location) ○ assigning appropriate metadata; ○ roles and responsibilities of offeror; ○ roles and responsibilities of FW staff; ○ schedule for migrating (automated and manual) activities; ○ migration assumptions; ○ appropriate training for FW staff; ○ appropriate access to FW staff with temporary access to automated migration tool; ○ migration validation and FW verification and approval; ○ migration issue log repository and process; and ○ Identify files that cannot be migrated and provide options to fix the files for future migration. 	Migration Plan
Prepare for Existing SharePoint Migration	<ul style="list-style-type: none"> ● Assess the existing content and data on SharePoint (WSS 2.0 and SharePoint Online). ● Collaborate with existing SharePoint (WSS 2.0 and SharePoint Online) site owners on their content inventory to confirm the data is organized and structured for automated migration. ● Verify migration readiness. 	Content Inventory Readiness – Existing SharePoint
Prepare for Existing Intranet Migration	<ul style="list-style-type: none"> ● Assess the existing intranet content and data (Flat HTML and Links to Network Drives). ● Collaborate with existing intranet content owners on their content inventory to confirm the data is organized and structured for automated migration. ● Verify migration readiness. 	Content Inventory Readiness – Intranet
New Content	<ul style="list-style-type: none"> ● Identify and provide a list of new content required for the Solution. 	New content list and requirements

	<ul style="list-style-type: none"> Define the new content requirements (i.e. estimated characters, image sizes and pixels, etc). Demonstrate and provide examples how the new content will display within the new design. 	
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2.4.6 User Profiles

Activity	Description	Deliverable
User Profile	<ul style="list-style-type: none"> Facilitate and provide direction on the user profile fields to be displayed and editable. Document and recommend on-demand governance for the user profile information. 	User Profile Fields & Governance Update the Governance Plan

2.5 EXECUTION OF SOLUTION

2.5.1 Environment Readiness

Activity	Description	Deliverable
Environment Evaluation & Recommendations	<ul style="list-style-type: none"> Assess the existing FW O365 tenant and environments. Provide recommendations and assumptions for deployment environments, backup and other 3rd party tools. 	Environment Recommendations
Release Management	<ul style="list-style-type: none"> Define a release management plan for each environment, including publishing and deploying Solution and/or resolved defects to each FW tenant and approach for FW validation. 	Release Management Plan
Configure Tenant	<ul style="list-style-type: none"> Configure the SharePoint Online tenants (test and production), including but not limited to user profile settings, app settings, device settings and external sharing rules. 	Configured tenant

2.5.2 Implementation

Activity	Description	Deliverable
Implement Solution on FW Tenant	<ul style="list-style-type: none"> Set up and verify the approved information architecture, including but not limited to the term store and term sets, content types, site map and navigation. Set up and verify the security and access. Configure search and search templates. Set up and verify the approved branding. Set up and verify site templates with approved branding. Configure and verify user profiles. Create intranet and project sites. 	New Solution

Content & Page Set Up	<ul style="list-style-type: none"> Support content & page readiness, including but not limited to, web part and page layout, creation of lists or libraries, assistance with navigation or any other SharePoint content related help. 	Content & Page Set Up
Search Set Up	<ul style="list-style-type: none"> Execute the Search Planning activities including but not limited to, combined out-of-box and custom indexing results and refinements. 	Search Results
Brand Documentation	<ul style="list-style-type: none"> Document and obtain approval of the Solution branding document. 	Brand Documentation (Style Guide)
Brand Transition	<ul style="list-style-type: none"> Document how to manage the branding components, including any customizations. Conduct training session on managing the brand components. 	Installation Documentation Brand Training Session
As Built Documentation	<ul style="list-style-type: none"> Document the final state of the Solution including the final updates to the requirements documents. 	As Built Documentation

2.5.3 Migration

Activity	Description	Deliverable
Migration Readiness	<ul style="list-style-type: none"> Confirm readiness of data to be migrated from the existing WSS 2.0, SharePoint Online sites, and existing intranet, including HTML and network drives. Configure and confirm migration tool readiness. Confirm migration validation method and offeror assigned migration staff are ready. Provide any agreed upon FW staff access rights and permissions to migration tool. 	Confirm migration readiness
Manage Existing SharePoint Migration	<ul style="list-style-type: none"> Execute the planned migration and validation steps. Verify the migration and tagging of the data. Complete migration, including any required manual migrations. Report on migration execution results. 	Report completion of existing WSS 2.0 and SharePoint Online data migrated
Manage Existing Intranet Migration	<ul style="list-style-type: none"> Execute the planned migration and validation steps. Verify the migration and tagging of the data. Complete migration, including any required manual migrations. Report on migration execution results. 	Report completion of existing intranet data migrated
Manage Migration Issues	<ul style="list-style-type: none"> Manage migration issues, including troubleshooting why an issue has occurred, coordinating with FW data owners, and tracking issues through resolution. Provide support for migrated content. 	Migration issue tracking repository
New Content Loading	<ul style="list-style-type: none"> Support FW with new content manual loading. Answer questions about new content migration and formatting. 	Support New Content
New Apps	<ul style="list-style-type: none"> Support FW with app configuration. 	Support New Apps

	<ul style="list-style-type: none"> • Answer questions about app configurations and format. 	
Go Live Migration	<ul style="list-style-type: none"> • Provide the final delta-sync of content and data migrated. • Adjust permissions of WSS 2.0 and SharePoint Online migrated sites to “read only” • Verify final site content present, navigable and searchable. 	Final Site Content

2.5.4 Verification & Validation

Activity	Description	Deliverable
Manage User Acceptance Testing (UAT) Defects and Enhancements	<ul style="list-style-type: none"> • Manage the User Acceptance Testing (UAT) of the Solution, including establishing a UAT repository, troubleshooting defects, identifying enhancements for future phases, addressing FW staff questions and concerns with the Solution. • Facilitate meetings to address UAT feedback, prioritize the work to be done and provide status of each item. 	UAT Repository
UAT Approval	<ul style="list-style-type: none"> • Obtain UAT approval to proceed with Go Live. 	UAT Approval

2.5.5 Training

Activity	Description	Deliverable
Training Plan	<ul style="list-style-type: none"> • Recommend a training plan based on the Solution that addresses change management and long-term adoption needs. • Communicate any additional costs and/or resources required for training. 	Training Plan
All Staff Training	<ul style="list-style-type: none"> • Provide training sessions to end users including but not limited to navigating O365, the new intranet, new processes (i.e. requesting a private site, content change on a page, etc.), search and search results, user profiles, private team and project sites. • Provide training materials and training that is customized to FW’s Solution, including branding, fields, and activities. 	All Staff Training
Branding Training	<ul style="list-style-type: none"> • Provide FW with training on managing the branding of the intranet, including customizations. • Provide training that is specific to the FW Solution. 	Branding Training
Content Management Training	<ul style="list-style-type: none"> • Provide site owners and members with SharePoint online training for managing training. 	Content Management Training

2.6 FUTURE ROADMAP DISCOVERY

Activity	Description	Deliverable
Establish an Inventory of Forms	<ul style="list-style-type: none"> • Identify and create a list of the FW forms, including recommendation on whether to implement in SharePoint and the level of complexity and effort to implement. 	Form list

<p>Records Management Assessment</p>	<ul style="list-style-type: none"> • Provide expertise in records management. • Document and describe the approach for identifying assets for records management and the process for establishing it in SharePoint Online. • Using FW sample documents and schedules, provide examples of record management capabilities in SharePoint Online including but not limited to the process of creating, retaining and purging/archiving records, define what types of content and schedules can be used and any associated limitations, specify where and when in the process to tag content, identify out-of-box types of rules that can be applied. Using FW sample documents and schedules, provide examples of record management capabilities in SharePoint Online including but not limited to the process of creating, retaining and purging/archiving records, define what types of content and schedules can be used and any associated limitations, specify where and when in the process to tag content, identify out-of-box types of rules that can be applied. • Provide expertise in how to incorporate records management rules to data already in SharePoint Online. 	<p>Records Management Report of Findings</p> <p>Demonstration of Process Samples</p>
<p>Ad Hoc Analysis</p>	<ul style="list-style-type: none"> • At FW direction provide discovery and analysis of business problems or opportunities relating to content management or information management. • Outcome of recommendations will drive decisions on future phase implementation. 	<p>Analysis and Recommendations</p>
<p>Phase 2+ Roadmap</p>	<ul style="list-style-type: none"> • Recommend based on the Solution discovery and additional parallel discovery efforts and implementation enhancements activities for future phases, including complexity and effort. • Establish in collaboration with FW a roadmap of future project phases including options for delivery, implications, and recommendations. 	<p>Phase 2+ Roadmap</p>
<p>Phase 2+ Prospective Roadmap Items</p>	<ul style="list-style-type: none"> • Re-Architect & Migrate Public Folders and related workflows from Exchange Online to SharePoint Online • Records Management (Deeper Dive) Process, Architecture, Integration, and Implementation • External Users, Retirees, Board Member and Vendor (Deeper Dive) on process and implementation. • Incorporate future Microsoft Office 365 functionality and capabilities. • Board meeting preparation & coordination <ul style="list-style-type: none"> ○ Development, review, and coordination of agenda, board items, and committee items ○ Publication and retention (e.g., supplement existing use of Diligent app) 	<p>Phase 2+ Options, Analysis, and Recommendations</p>

	<ul style="list-style-type: none"> • GIS Search Tool (Currently this functionality is provided through a separate on-premise SharePoint instance running under Microsoft Search Server Express. This application establishes relationships between geospatial content in ArcGIS map layers depicting FW assets (e.g., pipes, valves) and related documents (e.g., CAD drawings, maintenance manuals) and other files for end users to search and view). See Appendix J for more information on the existing/as-is system. • Expand on search indexing and fine tune search results; • Basic systems integration to present an executive/management “Dashboard” of KPIs which summarize the state of the business and its operations <ul style="list-style-type: none"> ○ SAP <ul style="list-style-type: none"> ▪ HR (Employee) Details ▪ Financials ▪ Customers ▪ Asset Management ▪ Procurement ▪ And any additional modules or metrics in SAP or related systems ○ LIMS (Laboratory Information Management System) ○ GIS (ESRI ArcGIS) ○ Operational Technologies and Systems (e.g., systems control data) ○ Other Data Sources (e.g., SQL, Oracle, Web Services) • Integration with Engineering, Facilities, & Construction Management content, tools, and workflows <ul style="list-style-type: none"> ○ AutoDesk Suite/AutoCAD content & workflows ○ Engineering Projects ○ Engineering Records Archive ○ SAP Content, Data, Search, & Workflow Integration ○ Other content & third-party tools • Extranets and other third-party workflow / information exchange scenarios • Additional phases of content migration & architecture optimization <ul style="list-style-type: none"> ○ Transition from file shares • Broader Microsoft Office 365 implementation & optimization • Microsoft Office 365 Platform Management <ul style="list-style-type: none"> ○ Monitoring ○ Problem Resolution ○ Security 	
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	<ul style="list-style-type: none"> ○ Data Protection ● Training & Support <ul style="list-style-type: none"> ○ Ongoing ○ Focused ● Other Business Scenarios as FW's Needs and Priorities Dictate 	
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2.7 SCOPE OF WORK COMPONENTS

2.7.1 Solution Experience

FW desires qualified offerors with proven experience in implementing SharePoint Online solutions for intranet, enterprise, team and community sites. Proven experience includes recent implementations of the proposed version of the solution in jurisdictions similar or larger in size and complexity of FW. Qualified offerors shall provide insight into long-term business solutions within the Office 365 platform.

2.7.2 Implementation Plan and Methodology

Fairfax Water desires an offeror with a proven, clear implementation methodology, an approach to phasing the implementation that provides value early in the process without introducing undue risk, a process for mitigating known risks and identifying potential unknown risks, and a detailed project work plan that addresses project management best practices. In addition, the implementation must address the following:

1. Project Management – FW is seeking offerors which follow project management best practices, specifically as related to identifying and managing resources and risks.
2. Governance – FW is seeking offerors who have established governance plans in SharePoint that incorporate on-demand features and set standards for maintaining a long-term Solution.
3. Branding - FW desires a professional brand Solution that adheres to industry design best practices but with limited customizations and low maintenance requirements.
4. Information Architecture – FW is seeking offerors who follow knowledge management and information architecture best practices.
5. Migration – FW desires offerors who follow migration best practices while taking into account individual clients and migration rules.
6. Testing – FW desires a project work plan with clear deliverables and tasks, along with resources, for testing, managing and resolving issues identified during test cycles.
7. Training – FW desires onsite training for site owners of the Solution in preparation for automated and manual content migration and for all staff of the end-Solution in preparation for rollout. Training to be customized as appropriate for FW's Solution and provides end users with FW-specific training documentation and reference information to Microsoft's training.

2.7.3 Project Organization and Staffing

The offeror shall identify key personnel and other supporting staff with the skills and characteristics to support the Solution. The offeror shall identify which project deliverables and/or tasks will be completed onsite vs remotely and include the staff supporting the onsite tasks. While offeror's presence is not required onsite daily, FW expects offeror project staff, specifically key personnel, to be local so they can be onsite for significant project milestones, requirements workshops, user acceptance testing, deliverables, and ad hoc meetings. FW expects the offeror to manage all project team staff, including sub-contractors and/or third-party partners.

FW will support the project with a project manager, a system administrator, and subject matter experts as needed. Responsibility for the work and project resides with the Contractor. FW will report and obtain decisions through an established Governance Committee.

III. INSTRUCTIONS TO OFFERORS

3.1 ADDITIONAL INFORMATION

All questions relating to this solicitation shall be submitted in writing to Elizabeth B. Dooley, CPPO, CPPB, Procurement Program Lead Buyer, in the Procurement Department via email to edooley@fairfaxwater.org. For a question to be considered, the subject line of the email should state the following: RFP No. 17-79 Questions. Questions should be succinct and must include the submitter's name, title, company name, company address, and telephone number. Prior to the award of a contract resulting from this solicitation, offerors and prospective offerors are prohibited from contacting any FW staff other than those assigned to the Procurement Department.

RFP 17-79 – TENTATIVE SCHEDULE

RFP ISSUANCE	11/16/2017
QUESTION DEADLINE	11/22/2017 @ 5PM EST.
ADDENDUM 1 ISSUANCE	11/29/2017
PROPOSALS DUE	12/12/2017 @ 2PM EST.
ORAL PRESENTATIONS	01/08/2018
NEGOTIATIONS	01/11/2018
AWARD	01/31/2018
CONTRACT COMMENCEMENT	02/19/2018

If any questions or responses require revisions to this solicitation as it was originally published, such revisions will be by formal addendum only. If this solicitation includes a separate FW contact for technical information, offerors are cautioned that any written, electronic, or oral representations made by any FW representative or other person that appear to change materially any portion of the solicitation shall not be relied upon unless subsequently ratified by a written addendum to this solicitation issued by the Procurement Department.

3.2 TRADE SECRETS OR PROPRIETARY INFORMATION

Trade secrets or proprietary information that is submitted by an offeror in connection with a procurement transaction may be exempted from public disclosure under the Virginia Freedom of Information Act ("VFOIA"). However, the offeror must invoke the protection of this subsection prior to or upon submission of the data or other materials, and must identify clearly and in writing, on the Proposal Form, the data or other materials sought to be protected and state the reasons why protection is necessary or falls within the exceptions to the VFOIA. It is the offeror's sole responsibility to defend such exemptions if challenged in a court of competent jurisdiction.

3.3 DEBARMENT STATUS

The offeror shall indicate, in the space provided on the Proposal Form, whether or not it, or any of its principals, is/are currently debarred from submitting proposals to FW or any other state or political subdivision, and whether or not it is an agent of any person or entity that is currently debarred from submitting proposals to FW or any other state or political subdivision. An affirmative response may be considered grounds for rejection of the proposal.

3.4 CONFLICT OF INTEREST STATEMENT

The offeror must provide a statement regarding potential conflict of interest. The certification shall be in the form provided in this solicitation, signed by an authorized agent and principal of the offeror and notarized.

3.5 QUALIFICATION OF OFFERORS

Each offeror may be required, before the award of any contract, to show to the complete satisfaction of the Procurement Manager that it has the necessary facilities, ability, and financial resources to comply with the contract and furnish the service, material or goods specified herein in a satisfactory manner. Each offeror may also be required to provide past history and references which will enable the Procurement Manager to be satisfied as to the offeror's qualifications. Failure to qualify according to the foregoing requirements will justify rejection by FW of a proposal and its respective offeror.

3.6 OFFEROR INVESTIGATIONS

Before submitting a proposal, each offeror shall make all investigations and examinations necessary to ascertain all conditions and requirements affecting the full performance of the contract and to verify any representations made by FW that the offeror will rely upon. No pleas of ignorance of such conditions and requirements resulting from failure to make such investigations and examinations will relieve the successful offeror from its obligation to comply in every detail with all provisions and requirements of the contract documents, or will be accepted as a basis for any claim whatsoever for any monetary consideration on the part of the successful offeror.

3.7 COMPETITIVE NEGOTIATION FOR NON-PROFESSIONAL SERVICES

This solicitation is let under the Virginia Public Procurement Act (VPPA) procedure, "Competitive Negotiation for Goods and Services". Under this procedure, the content of the proposals, and the identity of the offerors are not public record until an award determination has been made. Because of this restriction, the opening of proposals is not public.

3.8 AUTHORITY TO TRANSACT BUSINESS

Any offeror organized as a stock or non-stock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth of Virginia as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia, or as otherwise required by law. The proper and full legal name of the firm or entity and the identification number issued to the offeror by the Virginia State Corporation Commission must be written in the space provided on the Proposal Form. Any offeror that is not required to be authorized to transact business in the Commonwealth shall include in its proposal a statement describing why the offeror is not required to be so authorized. FW may require a firm to provide documentation prior to award which: 1) clearly identifies the complete name and legal form of the firm or entity (i.e. corporation, limited partnership, etc.), and 2) establishes that the firm or entity is authorized by the State Corporation Commission to transact business in Virginia. Failure of a prospective and/or successful offeror to provide such documentation shall be grounds for rejection of the proposal or cancellation of the award. For further information refer to the Commonwealth of Virginia State Corporation Commission website at: www.scc.virginia.gov.

3.9 INSURANCE REQUIREMENTS

Each offeror must review the insurance requirements section carefully with its insurance agent or broker prior to submitting a proposal to ensure they can provide the specific coverage requirements and limits applicable to this solicitation. If the offeror is not able to meet the insurance requirements of the solicitation, alternate insurance coverage satisfactory to FW may be proposed by the offeror and considered by FW. Written requests for consideration of alternate coverage must be received by the FW Procurement Manager at least ten (10) calendar days prior to the date set for receipt of proposals. If FW denies the request for alternate coverage, the coverage required by the Insurance Requirements section

must be provided. If FW permits alternate coverage, an addendum to the Insurance Checklist will be issued prior to the time and date set for receipt of proposals.

3.10 INTEREST IN MORE THAN ONE PROPOSAL, AND COLLUSION

More than one proposal received in response to this solicitation from an individual, firm, partnership, corporation, affiliate, or association under the same or different names will be rejected. Reasonable grounds for believing that an offeror is interested in more than one (1) proposal for a solicitation both as an offeror and as a subcontractor for another offeror, will result in rejection of all proposals in which the offeror is interested. However, a firm acting only as a subcontractor may be included as a subcontractor for two (2) or more offerors submitting a proposal for the work. Any or all proposals may be rejected if reasonable grounds exist for believing that collusion exists among any offerors. Offerors rejected under the above provisions shall be disqualified if they respond to a re-solicitation for the same work.

3.11 PROPOSAL WITHDRAWAL

No proposal may be withdrawn after it is filed unless the offeror makes a request in writing to the FW Procurement Manager prior to the time and date set for the receipt of proposals or unless FW fails to award or issue a notice of intent to award a contract within one hundred and twenty (120) days after the date and time set for receipt of proposals.

3.12 OPTIONAL RIDER CLAUSE

Subject to the mutual agreement between the parties, any contract awarded on the basis of this solicitation may be used by any public entity (to include jurisdictions comprising the Metropolitan Washington Council of Governments), to enter into a contract for the services described and defined herein. For single purchases, the contract may be used for up to 12 months from the actual date of contract award. For multi-year contracts, the contract may be used throughout the effective period of the contract. Contracts awarded as a result of this solicitation will be subject to these terms and conditions, and/or such terms and conditions as may be required by the controlling body for the public agency using the contract. Pricing shall be as offered by the successful Offeror and subsequently accepted by FW.

3.13 CONTRACT AWARD IS IN THE BEST INTEREST

FW reserves the right to accept or reject proposals, to waive any informalities or irregularities therein and to contract as the best interests of FW may require in order to obtain the goods and/or services that best meet the needs of FW, as described in this RFP. Selection of a proposal does not mean that all aspects of the proposal are acceptable to FW. FW reserves the right to negotiate the modification of terms and conditions with the offeror offering the best value to FW in conjunction with the evaluation criteria contained herein prior to the execution of a contract, to ensure a satisfactory contract.

3.14 NOTICE OF DECISION TO AWARD

FW will post a written Notice of Decision to Award on our public website, stating the date the decision to award was made, and identifying the name(s) of the awardee(s).

IV. PROPOSAL REQUIREMENTS

4.1 GENERAL

Proposals must be submitted in hard copy, and must be fully executed. FAILURE TO SUBMIT A PROPOSAL WITH A FULLY-COMPLETED PROPOSAL FORM USING THE PROPOSAL FORM PROVIDED IN THIS SOLICITATION MAY BE CAUSE FOR REJECTION OF THE PROPOSAL. The Proposal Form must be signed by a person authorized to legally bind the offeror.

Offerors must include an original longhand signature in at least one of the proposals submitted, and shall clearly mark on the face of that proposal the word "ORIGINAL". The additional copies required herein may include photocopies of the original Proposal Form.

Modification of or additions to any portion or terms of the solicitation may be cause for rejection of the proposal; however, FW reserves the right to decide, on a case-by-case basis, in its sole discretion, whether or not to reject such a proposal as nonresponsive.

Proposals not submitted in the number of copies requested are subject to immediate rejection. Proposals submitted by facsimile or electronically will NOT be accepted.

Proposals and all documents related to this solicitation submitted to FW by an offeror or a prospective offeror shall, upon receipt by FW, become the property of FW.

The offeror's proposal shall address the required information identified under the Proposal Submittal Elements section below, in the order listed, and shall not exceed the stated page limitations, if any. The proposal shall be limited to a page size of 8 ½" x 11", single space and type size shall not be less than 10 point font for each response item. Note: for page-counting purposes, a page equals a one-sided sheet. If a page limit is not noted within the section below there is no page limit.

4.2 EXPENSES INCURRED IN PREPARING PROPOSAL

FW accepts no responsibility for any expense incurred by any offeror in the preparation and presentation of a proposal. All expenses related to an offer are the sole responsibility of the offeror.

4.3 PROPOSAL FORM SUBMISSION

The required Proposal Form is provided with this solicitation. One (1) proposal with a Proposal Form containing an original longhand signature, and nine (9) additional copies, each including a photocopy of the original signed Proposal Form (ten (10) copies total), and an electronic copy of the proposal on a SharePoint site which can be accessed by FW, shall be submitted by hand in a sealed envelope no later than the time and date deadline specified in this solicitation to:

Fairfax Water
Procurement Department
8570 Executive Park Avenue
Fairfax, Virginia 22031

Timely submission of the proposal is solely the responsibility of the offeror. Proposals received after the specified date and time will be rejected. The exterior of the envelope or package shall indicate the name of the offeror, the scheduled proposal submission date and time, and the number of the solicitation. The time and date of receipt shall be indicated on the envelope or package by FW.

4.4 INCOMPLETE DOCUMENTS

Each offeror is responsible for having determined the accuracy and/or completeness of the solicitation documents upon which it relied in making its proposal, and has an affirmative obligation to notify FW Procurement Manager immediately upon discovery of an apparent or suspected inaccuracy, error in, or

omission of any pages, drawings, sections, or addenda whose omission from the documents was apparent from a reference or page numbering or other indication in the solicitation documents.

If a potential offeror downloaded an electronic version of the solicitation documents, that potential offeror is responsible for determining the accuracy and/or completeness of the electronic documents.

If the successful offeror proceeds with any activity that may be affected by an inaccuracy, error in, or omission in the solicitation documents of which it is aware but has not notified FW Procurement Manager, the offeror hereby agrees to perform any work described in such missing or incomplete documents at the offeror's sole expense and at no additional cost to FW.

4.5 PROPOSAL STANDARDS

Proposal submitted in response to this solicitation shall meet standards of professional writing established for the type of report or written material provided, shall be thoroughly researched for accuracy of content, shall be grammatically correct and not contain spelling errors and shall be submitted in a format outlined herein. Whenever possible, proposals submitted in response to this solicitation shall comply with the following guidelines:

- All copies should be printed on at least thirty percent (30%) recycled-content and/or tree-free paper;
- All copies shall be double-sided;
- Covers or binders shall be recyclable, made from recycled materials, and/or easily removable to allow for recycling of pages (proposals with glued bindings that meet all other requirements are acceptable);
- The use of plastic covers or dividers should be avoided;
- Unnecessary attachments or documents not specifically asked for should not be submitted, and superfluous use of paper (e.g. separate title sheets or chapter dividers) should be avoided; and
- Numbered tabs and dividers are required for each of the sections listed and in the order below:
 - PROPOSAL FORM
 - EXECUTIVE SUMMARY
 - SOLUTION EXPERIENCE
 - IMPLEMENTATION PLAN AND METHODOLOGY
 - PROJECT ORGANIZATION AND STAFFING
 - PRICING
 - REFERENCES
 - FINANCIAL STABILITY

4.6 PROPOSAL SUBMITTAL ELEMENTS

I. PROPOSAL FORM

Attachment A must be fully completed and submitted in Tab I or the proposal could be deemed non-responsive. This attachment also includes the Conflict of Interest Statement & Insurance Checklist.

II. EXECUTIVE SUMMARY

The Offeror's proposal shall contain an executive summary that summarizes why their firm is the most qualified for this scope of work, anticipated challenges, and innovative approaches, and opportunities for cost savings.

III. SOLUTION EXPERIENCE

Offerors shall provide information describing its experience, capabilities and other qualifications for this project.

The Offeror shall restate each question or information request verbatim from this solicitation and include a response. A response is required for each item.

Item #	Description
1.	<p>Attachment B must be fully completed.</p> <p>Provide information about the offeror’s experience and competency with delivering multi-phased projects as it relates to the proposed Solution in the RFP, including:</p> <ul style="list-style-type: none"> • Number of continuous and recent years supporting or executing similar solutions (minimum of 15 years) • List client and project name of similar or larger recently completed projects executed (minimum of 10) • Provide a link to offeror profile on Microsoft Pinpoint of Microsoft Partner Standing <p>Local area offices and employee base available to support project and attend local ad hoc meetings</p>
2.	<p>Attachment C must be fully completed for each 3rd party software or service provider for the Offeror to execute the Solution of the RFP.</p> <ul style="list-style-type: none"> • Company Name • Software or Service Name • Description of purpose in Solution • Prior experience using software or service
3.	<p>Describe the offeror’s long-term development strategy and plans to ensure that the Solution proposed, and the firm remains viable in the marketplace, including future direction of the technology, roadmap and products proposed.</p>
4.	<p>Attachment D must be fully completed.</p> <p>Provide a minimum of four (4) recent detailed solution experiences from the projects listed above in Question #1 with a comparable to FW Solution based upon characteristics such as stakeholder size and diversity, content migration from SharePoint on-premises, network drives and HTML pages, complex and challenging information architecture, and search requirements. Experience should be within the last five (5) years from the issuance date of this RFP and include the following information:</p> <ul style="list-style-type: none"> • Project Name • Point of Contact (POC) Name • POC Role (preferably the Contract Project Manager) • POC Email Address • POC Phone Number • Stakeholder Size & Diversity • Year of implementation • Estimated Duration of implementation • Actual Duration of implementation • Original Contract Amount • Final Actual Contract Amount • Summary of Solution, including complexity and methods of intranet architecture, content migration and a robust search. • Describe any challenges and how you resolved them. • Names of the key personnel supporting the implementation.

	<ul style="list-style-type: none"> Rate your performance on the project using a scale from 1 - 10 with 1 being poor performance and 10 being superb performance. Provide an explanation for each rating.
5.	<p>Attachment E to be fully completed to indicate the experience with FW technology:</p> <ul style="list-style-type: none"> SAP (ECC 6.0) ESRI ArcGIS AutoDesk Suite/ AutoCAD Content & Workflows Microsoft O365 Platform: <ul style="list-style-type: none"> Analytics/ Dashboard Training Support Microsoft Office 365 Platform Management: <ul style="list-style-type: none"> Monitoring Problem Resolution Security Data Protection
6.	Describe your experience working within the water or waste water industry, other utilities, or other similar business environments or scenarios.

IV. IMPLEMENTATION PLAN AND METHODOLOGY

Offerors shall provide information describing its implementation plan and methodology with specific focus on project management, testing, and training.

The Offeror shall restate each question or information request verbatim from this solicitation and include a response. A response is required for each item.

Item #	Description
Implementation Plan and Methodology	
1.	<p>Describe the methodology to be used in implementing the Offeror’s proposed Solution including how offeror would approach the discovery of the information architecture and content and data migration.</p> <p>Describe in detail the stages of the overall process.</p> <p>Describe tools or software that will be used.</p> <p>Describe any assumptions or expectations, including how the Solution will be consumed and what client devices and specs will be supported.</p> <p>Describe proposed best practices rolling out the Solution.</p>
2.	<p>Provide a proposed implementation work plan with milestones, deliverables and major tasks and sub-tasks.</p> <p>The work plan should support the single recommended approach to the technical environment. It shall be presented in a Gantt chart showing proposed start and end dates. For each milestone, deliverable and task, the work plan shall identify the offeror’s and FW resources, man hours and pricing per offeror positions hours and major tasks and sub-tasks. Project dependencies and critical path must be identified.</p>
3.	Describe any assumptions regarding review and approval cycles for deliverables, with an assumption of two revision cycles leading to FW approval for each.
4.	Provide a description of the proposed approach to mapping business processes to system functionality to achieve best practices and provide maximum value.
5.	Describe how you will document the solution environment and transfer knowledge to assure continuity and sustainability of FW practices and operations.

Project Management	
6.	Describe the project management practices, methodologies and/or techniques that would be used to manage costs, schedule, scope and resources.
7.	Describe the roles and responsibilities, including Executive Sponsorship, in your organization for remediating project issues as well as any general concerns or issues relating to FW's needs.
8.	Describe how you approach establishing a roadmap for future phase and delivery.
9.	Provide a description of the proposed approach to managing the business process and employee role changes that are inevitable with implementation of the new Solution.
10.	Describe how the change management methodology integrates with the overall implementation methodology.
Governance	
11.	Describe the governance approach to defining and implementing a short term and long-term Solution with a solid governance structure and plan. Describe the approach to developing and facilitating key decisions.
Enterprise Architecture	
12.	Describe the best practices and approach for establishing a holistic enterprise architecture and solution. Explain specifically how your methodology and approach objectively discerns the best value and balance of solution to meet the needs of the users and the business. How are recommendations regarding "build vs. buy" decisions evaluated? How are recommendations regarding the underlying platform or technology to implement a given business scenario evaluated?
13.	Explain in the context of your business and delivery practice how Microsoft platforms and technologies such as O365/SP in relate to other FW platforms and technologies noted – as a specific example, does your practice embrace and position Microsoft technologies first and foremost and other technologies are secondary? Why or why not?
Information Architecture	
14.	Describe the practices, methodologies and/or techniques that would be used to gather information to define the information architecture (site map; content types; metadata; etc.) and obtain consensus to the Solution across the Divisions and Departments.
Branding	
15.	Describe the approach for defining and obtaining approval of the design of the Solution.
Migration	
16.	Describe the content migration practices, methodologies and/or techniques, assumptions including number of iterations of migration that would be used to migrate existing WSS 2.0 and SharePoint Online and intranet content (HTML, network drives and new content) to the new Solution.
17.	Describe expertise and best practices for establishing content migration guidelines and recommendations to manage content volume.
User Profiles	
18.	Describe the approach for defining the user profile fields and governance based on best practices and prior experience, include assumptions for discovery and implementation.
Testing	
19.	Describe the approach to testing the Solution, including the test scripts development, oversight of testing cycles, and issue management.
Training	
20.	Describe the proposed training approach tailored for FW, including customizations, branding, and end user roles.

Search	
21.	Describe the approach for conducting discovery and analysis and implementation of search within the Office 365 platform, custom indexes and metadata, and network drive files to meet the identified in the Scope of Service section specifically the business goals and business scenarios.
22.	Describe the approach for establishing good long-term stewardship and governance over search.
Records Management	
23.	Describe SharePoint records management capabilities, process for creating, retaining, purging and archiving records.

V. PROJECT ORGANIZATION AND STAFFING

Offerors shall provide information describing its project organization and staffing for this implementation.

The Offeror shall restate each question or information request verbatim from this solicitation and include a response. A response is required for each item.

Item #	Description
1.	Provide description of how offeror and staff maintain knowledge on the new Microsoft functions and capabilities while delivering multi-phased projects.
2.	Attachment F must be fully completed. Provide a list of key personnel proposed to implement the Solution. <ul style="list-style-type: none"> • Role Title (indicate which are key personnel); • Description of the Role; and • Percentage of time the role will be dedicated to this project.
3.	Describe the approach and assumptions for providing onsite support. Include a table with the project milestone and/or task, number of trips for the specified project milestone and/or task, and the position titles of the onsite team.
4.	Attachment G must be fully completed. Provide the following information for the roles indicated as key personnel in the response to Question #2: <ul style="list-style-type: none"> • Staff Name; • Years of experience in proposed role; • Competency of the proposed staff such as but not limited to the following role requirements: <ul style="list-style-type: none"> ○ Project Manager: <ul style="list-style-type: none"> ▪ Minimum of 8 years continuously and recently on projects like the proposed Solution; ▪ Minimum of 6 recent projects facilitating and managing the project utilizing industry best practices; and ▪ Project Management Institute, Project Management Professional Certification. ○ Enterprise Architect <ul style="list-style-type: none"> ▪ Minimum of 15 years continuously and recently on a project like the proposed Solution; ▪ Minimum of 12 recent years holistically evaluating clients’ business and needs and articulating them into right-sized technology solutions across a portfolio of disparate platforms, data sources, infrastructure, and business processes; and

	<ul style="list-style-type: none"> ▪ FEAC CEA or similar certification or demonstrable competencies, knowledge, and experience ○ Information Architect <ul style="list-style-type: none"> ▪ Minimum of 15 years continuously and recently on a project like the proposed Solution; ▪ Minimum of 12 recent years facilitating end users through complex information architecture solutions; and ▪ Microsoft Most Valuable Professional (MVP). ○ Migration Lead <ul style="list-style-type: none"> ▪ Minimum of 15 years continuously and recently on a project like the proposed Solution; ▪ Minimum of 8 recent years in as a content migration lead; and ▪ Minimum of five (5) projects migrating WSS 2.0 to SharePoint Online. • Years of experience with Offeror; • US Citizen or legal residency; • Identify which project deliverables and/or tasks the staff will complete, including whether it will be done onsite or remotely; and • List of projects and role, duration on project, % capacity/dedication on project for which the person has acted specifically highlighting the projects included in the 10 clients list using or implementing the proposed Solution (Question #1 in the Solution Experience section).
5.	Attachment G must be fully completed. Provide the following information as required in Question #4, identifying backups for each of the key personnel.
6.	Provide resumes for staff indicated as key personnel and alternate key personnel.
7.	List any assumptions for estimating the offeror staff resources or 3 rd party staff necessary to meet the needs of the project.
8.	Describe how the offeror’s composed project team will work across the three tiers of the governance structure.
9.	Describe the offeror’s plan for maintaining continuity in the composition of the proposed project team, including describing the approach for when offeror’s staff and project key personnel leave the project and how offeror on-boards their staff when they start on the project.
10.	Describe the Offeror’s management structure and the methods to ensure adequate oversight and executive direction for the project, including management of subcontractors if applicable.
11.	List any assumptions Offeror has about FW key personnel availability or other resources for the project.
12.	Confirm that any assumptions have been validated pertaining to 3 rd party resources (if applicable).

VI. PRICING

Response to the pricing identified in Attachment H: Pricing Worksheet must be submitted both in Microsoft Excel format and paper copy. Offerors preparing a proposal under this solicitation may download a soft copy of the spreadsheet from FW website. Pricing responses shall include a printed version of the completed Excel spreadsheet as well an electronic copy on the SharePoint site referenced above.

In addition, Offeror shall provide any assumptions that would help FW to understand the cost proposal.

VII. REFERENCES

FW will select past clients based on the information provided by the offeror in Solution Experience and perform reference checks. No additional information needs to be submitted by offerors in this section.

VIII. FINANCIAL STABILITY

The Offeror shall provide a letter from an independent auditor attesting to the financial stability of the Offeror. NOTE: review of financial stability will not be performed during the evaluation of written proposal, and is therefore not part of the evaluation criteria for review of written proposals. Additional information may be requested by FW related to the Financial Stability of the Offeror.

V. EVALUATION PROCESS

Fairfax Water (hereinafter "FW") is soliciting proposals from offerors having experience and qualifications in the area identified in this solicitation. Each proposal must contain evidence of the offeror's experience and abilities in the specified area and other disciplines directly related to the proposed work. Other information required by FW may include the submission of profiles and resumes of the staff to be assigned to the project, references, illustrative examples of similar work performed, and other information that will clearly demonstrate the offeror's expertise in the area of the services sought by this solicitation. Offerors are encouraged to elaborate on their qualifications and performance data or staff expertise, as well as provide alternative concepts.

An Evaluation Committee will review and evaluate all written proposals and identify firms that may be invited to submit more detailed proposals, conduct oral presentations, and/or provide product or service demonstrations. The evaluation of written proposals will be based on the evaluation criteria identified elsewhere in this solicitation. The Evaluation Committee will rely upon the information provided in the written proposals submitted in order to select finalists. Subsequent stages of the process to select firms for negotiations may include, but are not limited to, review of more detailed proposals, oral presentations, or demonstrations. If such subsequent stages are conducted, they will be evaluated based on the same evaluation criteria used to evaluate written proposals, as relevant to the areas being evaluated. FW may consider site visits for those firms selected to participate in contract negotiations. FW may award a contract or initiate negotiations with one or more offerors without further contact with any other offerors.

VI. RFP ATTACHMENTS

FAIRFAX WATER
REQUEST FOR PROPOSALS NO. 17-79

ATTACHMENT A – PROPOSAL FORM

THE UNDERSIGNED UNDERSTANDS AND ACKNOWLEDGES THE FOLLOWING:

THE OFFICIAL, TRUE, AND COMPLETE COPY OF THE SOLICITATION DOCUMENTS, WHICH SHALL INCLUDE ANY ADDENDUMS THERETO, IS THE ELECTRONIC COPY OF THE SOLICITATION DOCUMENTS AVAILABLE FROM FW'S WEBSITE AT: http://www.fairfaxwater.org/procurement/current_bids.htm.

POTENTIAL OFFERORS ARE RESPONSIBLE FOR DETERMINING THE ACCURACY AND COMPLETENESS OF ALL SOLICITATION DOCUMENTS THEY RECEIVE, INCLUDING DOCUMENTS OBTAINED FROM FW, AND DOCUMENTS OBTAINED FROM ALL OTHER SOURCES.

I. ALL MATERIAL (PROPOSAL AND ATTACHMENTS) SUBMITTED SHALL BE IN TEN (10) COPIES, CONSISTING OF: ONE PROPOSAL, CLEARLY MARKED ON ITS COVER WITH THE WORD "ORIGINAL", WHICH SHALL INCLUDE THIS PROPOSAL FORM CONTAINING AN ORIGINAL LONGHAND SIGNATURE; AND NINE (9) ADDITIONAL COPIES, WHICH SHALL INCLUDE A PHOTOCOPY OF THE ORIGINAL SIGNED PROPOSAL FORM AND A ELECTRONIC COPY OF THE PROPOSAL ON SHAREPOINT SITE ACCESSABLE BY FW. THE ORIGINAL, SIGNED PROPOSAL FORM SHALL BE THE FIRST PAGE OF THE ORIGINAL PROPOSAL.

2. INDICATE THE NAME AND CONTACT INFORMATION OF THE PERSON WHO CAN RESPOND AUTHORITATIVELY TO ANY QUESTIONS REGARDING THIS PROPOSAL (PROJECT MANAGER).

NAME (PRINTED): _____ TITLE: _____

E-MAIL ADDRESS: _____ TEL. NO.: _____

TRADE SECRETS OR PROPRIETARY INFORMATION:

Trade secrets or proprietary information submitted by an offeror in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, §2.2-4342. Public inspection of certain records, F., of the Virginia Public Procurement Act states that the offeror the bidder, offeror or contractor shall (i) invoke the protections of this section prior to or upon submission of the data or other materials, (ii) identify the data or other materials to be protected, and (iii) state the reasons why protection is necessary.

Please mark one:

() No, the proposal I have submitted does not contain any trade secrets and/or proprietary information.

() Yes, the proposal I have submitted does contain trade secrets and/or proprietary information.

PROPOSAL FORM, PAGE _____ OF _____

If Yes, you must clearly identify below the exact data or other materials to be protected and list all applicable page numbers of the proposal containing such data or materials:

State the specific reason(s) why protection is necessary:

If you fail to identify the data or other materials to be protected and state the reasons why protection is necessary in the space provided above, you will not have invoked the protection of §2.2-4342. Public inspection of certain records, F., of the Code of Virginia. Accordingly, effective upon the award of contract, the proposal will be open for public inspection consistent with applicable law.

CERTIFICATION OF NON-COLLUSION: The undersigned certifies that this proposal is not the result of, or affected by, any act of collusion with another person (as defined in Code of Virginia Section 59.1-68.6 et seq.), engaged in the same line of business or commerce; or any act of fraud punishable under the Virginia Governmental Frauds Act (Code of Virginia §18.2-498.1 et seq.).

PROPOSAL FORM, PAGE _____ OF _____

THE PROPER FULL LEGAL NAME OF THE FIRM OR ENTITY SUBMITTING THIS PROPOSAL MUST BE WRITTEN IN THE SPACE PROVIDED BELOW. THIS PROPOSAL FORM, AND ALL OTHER DOCUMENTS REQUIRED BY THE SOLICITATION TO BE SUBMITTED WITH THIS PROPOSAL FORM, INCLUDING, BUT NOT LIMITED TO ALL ISSUED ADDENDUMS, MUST BE FULLY AND ACCURATELY COMPLETED AND SIGNED BELOW BY A PERSON AUTHORIZED TO LEGALLY AND CONTRACTUALLY BIND THE OFFEROR, OR THE PROPOSAL MAY BE REJECTED:

AUTHORIZED SIGNATURE _____

PRINT NAME AND TITLE _____

SUBMITTED BY: (LEGAL NAME OF ENTITY)			
ADDRESS:			
CITY/STATE/ZIP:			
TELEPHONE NO:		FACSIMILE NO.:	
THIS FIRM IS A: • INSERT NAME OF STATE _____ ___ CORPORATION, ___ GENERAL PARTNERSHIP, ___ LIMITED PARTNERSHIP, ___ UNINCORPORATED ASSOCIATION, ___ LIMITED LIABILITY COMPANY, ___ SOLE PROPRIETORSHIP			
IS FIRM AUTHORIZED TO TRANSACT BUSINESS IN THE COMMONWEALTH OF VA?			
IDENTIFICATION NO. ISSUED TO THE FIRM BY THE SCC:			
ANY OFFEROR EXEMPT FROM SCC AUTHORIZATION REQUIREMENT SHALL INCLUDE A STATEMENT WITH ITS BID WHY THEY ARE NOT REQUIRED TO BE SO AUTHORIZED			
IS YOUR FIRM OR ANY OF ITS PRINCIPALS CURRENTLY DEBARRED FROM SUBMITTING BIDS TO FAIRFAX WATER AUTHORITY, OR ANY OTHER STATE OR POLITICAL SUBDIVISION IN THE COMMONWEALTH OF VIRGINIA?			
OFFEROR STATUS:	MINORITY OWNED:	WOMAN OWNED:	NEITHER:

PROPOSAL FORM, PAGE _____ OF _____

INSURANCE CHECKLIST

CERTIFICATE OF INSURANCE MUST SHOW ALL COVERAGE AND ENDORSEMENTS INDICATED BY "X"

COVERAGES REQUIRED		LIMITS (FIGURES DENOTE MINIMUMS)
X	1	WORKERS' COMPENSATION STATUTORY LIMITS OF VIRGINIA
X	2	EMPLOYER'S LIABILITY \$100,000 ACCIDENT, \$100,000 DISEASE, \$500,000 DISEASE POLICY LIMIT
X	3	COMMERCIAL GENERAL LIABILITY(CGL) \$1,000,000 CSL BI/PD EACH OCCURRENCE, \$2 MILLION ANNUAL AGGREGATE
X	4	PREMISES/OPERATIONS \$500,000 CSL BI/PD EACH OCCURRENCE MILLION ANNUAL AGGREGATE
X	5	AUTOMOBILE LIABILITY \$1 MILLION BI/PD EACH ACCIDENT, UNINSURED MOTORIST
X	6	OWNED/HIRED/NON-OWNED VEHICLES \$1 MILLION BI/PD EACH ACCIDENT, UNINSURED MOTORIST
X	7	INDEPENDENT CONTRACTORS \$500,000 CSL BI/PD EACH OCCURRENCE, \$1 MILLION ANNUAL AGGREGATE
	8	PRODUCTS LIABILITY \$500,000 CSL BI/PD EACH OCCURRENCE, \$1 MILLION ANNUAL AGGREGATE
X	9	COMPLETED OPERATIONS \$500,000 CSL BI/PD EACH OCCURRENCE, \$1 MILLION ANNUAL AGGREGATE
X	10	CONTRACTUAL LIABILITY (MUST BE SHOWN ON CERTIFICATE) \$500,000 CSL BI/PD EACH OCCURRENCE
	11	PERSONAL AND ADVERTISING INJURY LIABILITY \$1 MILLION EA. OFFENSE, \$1 MILLION ANNUAL AGGREGATE
	12	UMBRELLA LIABILITY \$1 MILLION BODILY INJURY, PROPERTY DAMAGE AND PERSONAL INJURY
	13	PER PROJECT AGGREGATE \$1 MILLION PER OCCURRENCE/CLAIM
	14	PROFESSIONAL LIABILITY
	A	ARCHITECTS AND ENGINEERS \$1 MILLION PER OCCURRENCE/CLAIM
	B	ASBESTOS REMOVAL LIABILITY \$2 MILLION PER OCCURRENCE/CLAIM
	C	MEDICAL MALPRACTICE \$1 MILLION PER OCCURRENCE/CLAIM
	D	MEDICAL PROFESSIONAL LIABILITY \$1 MILLION PER OCCURRENCE/CLAIM
	15	MISCELLANEOUS E&O \$1 MILLION PER OCCURRENCE/CLAIM
	16	MOTOR CARRIER ACT END. (MCS-90) \$1 MILLION BI/PD EACH ACCIDENT, UNINSURED MOTORIST
	17	MOTOR CARGO INSURANCE
	18	GARAGE LIABILITY \$1 MILLION BODILY INJURY, PROPERTY DAMAGE PER OCCURRENCE
	19	GARAGE KEEPERS LIABILITY \$500,000 COMPREHENSIVE, \$500,000 COLLISION
	20	INLAND MARINE-BAILLIE'S INSURANCE \$
	21	MOVING AND RIGGING FLOATER ENDORSEMENT TO CGL
	22	DISHONESTY BOND \$
	23	BUILDER'S RISK PROVIDE COVERAGE IN THE FULL AMOUNT OF CONTRACT
X	24	XCU COVERAGE ENDORSEMENT TO CGL
	25	USL&H FEDERAL STATUTORY LIMITS
X	26	CARRIER RATING SHALL BE BEST'S RATING OF A-VII OR BETTER OR ITS EQUIVALENT
X	27	NOTICE OF CANCELLATION, NONRENEWAL OR MATERIAL CHANGE IN COVERAGE SHALL BE PROVIDED TO FAIRFAX WATER AT LEAST 30 DAYS PRIOR TO ACTION
X	28	THE FAIRFAX WATER SHALL BE AN ADDITIONAL INSURED ON ALL POLICIES EXCEPT WORKERS COMPENSATION, PROFESSIONAL LIABILITY, AND AUTOMOBILE LIABILITY
X	29	CERTIFICATE OF INSURANCE SHALL SHOW SOLICITATION NUMBER AND TITLE

INSURANCE AGENT'S STATEMENT:

I have reviewed the above requirements with the offeror named below and have advised the offeror of required coverages not provided through this agency.

AGENCY NAME: _____ AUTH. SIGNATURE: _____

OFFEROR'S STATEMENT:

If awarded the Contract, I will comply with contract insurance requirements.

OFFEROR NAME: _____ AUTH. SIGNATURE: _____

Attachment B

Complete as appropriate to Offeror's experience and current state the fields in white.

Experience and Competency			
Years Supporting Similar or Larger Solution			
List client and project name of similar or larger recently completed projects executed (minimum of 10)	#	Client Name	Project Name
	1		
	2		
	3		
	4		
	5		
	6		
	7		
	8		
	9		
	10		
Microsoft Partner Standing			
Microsoft Partner Recognition(s)			
Offeror Microsoft Pinpoint Link			
Local Offices and Staff			
Local area offices and employee base available to support project and attend local ad hoc meetings	Office Location	Employee Base	

Attachment C

Complete as appropriate the following form for each 3rd party software or service proposed by the Offeror to complete the Solution.

3 rd Party Software or Services	
Company Name	
Software or Service	
Description of Purpose in Solution	
Offeror's prior experience using software or service	

Attachment D

Complete the following form for 4 of the 10 clients listed in Attachment B that had a recent similar or larger Solution experiences.

Detailed Solution Experience	
Client Name	
Project Name	
Point-of-Contact (POC) Name	
POC Role (preferably the Contract Project Manager)	
POC Email Address	
POC Phone Number	
Stakeholder Size Impact (Number of Stakeholders)	
Stakeholder Diversity	
Stakeholder Complexity (Enterprise, Multiple Departments, 1 Department)	
Year of Implementation	
Original Estimated Duration of implementation	
Actual Duration of implementation	
Original Contract Amount	\$
Final Actual Contract Amount	\$
Summary of Solution including complexity of information architecture, content migration, and robust search requirements	
Describe any challenges and how you resolved the	<ul style="list-style-type: none"> • <Challenge> <ul style="list-style-type: none"> ○ <Resolution> • <Challenge> <ul style="list-style-type: none"> ○ <Resolution>

Names of the key personnel and roles supporting the implementation, specifically proposed staff for RFP Solution. (Add additional roles as appropriate)	Key Personnel	Role	Proposed Staff Member for this RFP Solution (Yes / No)
Rate your performance on the project using a scale from 1 - 10 with 1 being poor performance and 10 being superb performance. Provide an explanation for each rating			

Attachment E

Complete the form on Offeror experience with the following systems and platform areas.

Technology	Experience (Yes / No)	Summary of Experience
SAP (Experience with platform and modules in Appendix I)		
GIS (Experience with platform in Appendix J)		
AutoDesk Suite/AutoCAD content & workflows		
Microsoft Office 365 Platform: Analytics/ Dashboard		
Microsoft Office 365 Platform: Training		
Microsoft Office 365 Platform: Support		
Microsoft Office 365 Platform Management: Monitoring		
Microsoft Office 365 Platform Management: Problem Resolution		
Microsoft Office 365 Platform Management: Security		
Microsoft Office 365 Platform Management: Data Protection		

Attachment F

Provide a list of project team staff proposed to implement the Solution

Detailed Solution Experience	
Role	
Description of Role	
% of Time Allocated and Dedicated to Project	

Attachment G

Complete the following form for all key personnel proposed to implement the Solution (Question #4). And complete the form for backup personnel if the key personnel is unavailable to implement the Solution (Question #5)

Personnel				
Key Personnel or Backup?	<Enter either: Key Personnel OR Backup>			
Personnel Name				
Years of Experience in Proposed Role				
Years of experience with Offeror				
US Citizen or Legal Residency (Yes or No)				
Identify which project deliverables and/or tasks the staff will complete, including whether it will be done onsite or remotely				
List of projects and role and capacity for which the person has acted. Note: Highlighting the projects included in the 10 clients list using or implementing the proposed Solution (Question #1 in the Solution Experience section).	Project Name	Role	Duration on Project	% Capacity / Dedicated to Project

Attachment H – Pricing Workbook

The pricing workbook is made up of four worksheets as shown below: Instructions; 1 – Pricing; 2 – Rate Card; & 3 – Pricing Assumptions. Use the FW provided Microsoft Excel Pricing Workbook to complete this proposal submittal element.

Instructions

RFP No. 17-79 - Fairfax Water Intranet and Content Migration	
Pricing Response Workbook Instructions	
INSTRUCTIONS: Provide pricing to include any and all related costs, fees and/or expenses.	
GREEN SHADED FIELDS SHOULD BE FILLED OUT BY THE OFFEROR.	
Tab Name	Tab Description
1 - Pricing	Provide RFP Solution's Total Costs, including reoccurring and non-reoccurring costs: - All non-reoccurring costs for the Solution should be listed. - Reoccurring costs should include duration and escalation assumptions in the "3 - Pricing Assumptions" worksheet. - Make sure to include any one-time expenses, any hardware, software licenses, subscription fees, implementation fees, travel and expenses. - Add additional rows as necessary for reoccurring or non-reoccurring costs.
2 - Rate Card	Input all rate card information for resource personnel: - Include both Offeror staff and 3rd party contractors - Include personnel for the RFP Solution and any Future Phases, then indicate in the columns provided whether resource is planned for RFP Solution and/or Future Phases. - Make sure to cover consulting and development services in support of the Solution. - Add/modify the rows as appropriate to include all Offeror Team members.
3 - Pricing Assumptions	Identify any Pricing Assumptions in this worksheet. Please also include any assumptions about price escalation in this section.
Note: Within each worksheet, please ensure that you scroll down to pick up all response information required. PLEASE DO NOT INSERT OR DELETE ANY ROWS OR COLUMNS IN THIS WORKBOOK UNLESS ADDITIONAL INSTRUCTIONS WITHIN THE SPECIFIC WORKSHEET ALLOW YOU TO DO SO.	

1 – Pricing

RFP No. 17-79 - Fairfax Water Intranet and Content Migration	
Pricing Response Workbook Pricing	
INSTRUCTIONS: Please provide the pricing for each scoped area of the Solution, including all resources (Offeror and 3rd party personnel).	
TOTAL (Non-Reoccurring and Reoccurring Costs)	\$ -
Task/Item	Total
Non-Reoccurring Costs (including One-Time Expenses)	
Scoped Solution Costs:	
Management	
Discovery	
Governance Plan	
Information Architecture	
Branding	
Content	
User Profiles	
Execution of Solution	
Environment Readiness	
Implementation	
Migration	
Verification & Validation	
Training	
Future Roadmap Discovery	
Other Non-Reoccurring Costs:	
<Add rows for each other itemized costs as needed (e.g. one-time expenses, hardware, software license, subscription fees, implementation fees, travel and expenses, etc.)>	
Total	\$ -
Reoccurring Costs (If Applicable)	
<Add any reoccurring costs (e.g. Other 3rd party software subscriptions, on-going maintenance and support packages). Include any duration and escalation assumptions on the "3- Pricing Assumptions" worksheet.>	
Total	\$ -

2 – Rate Card

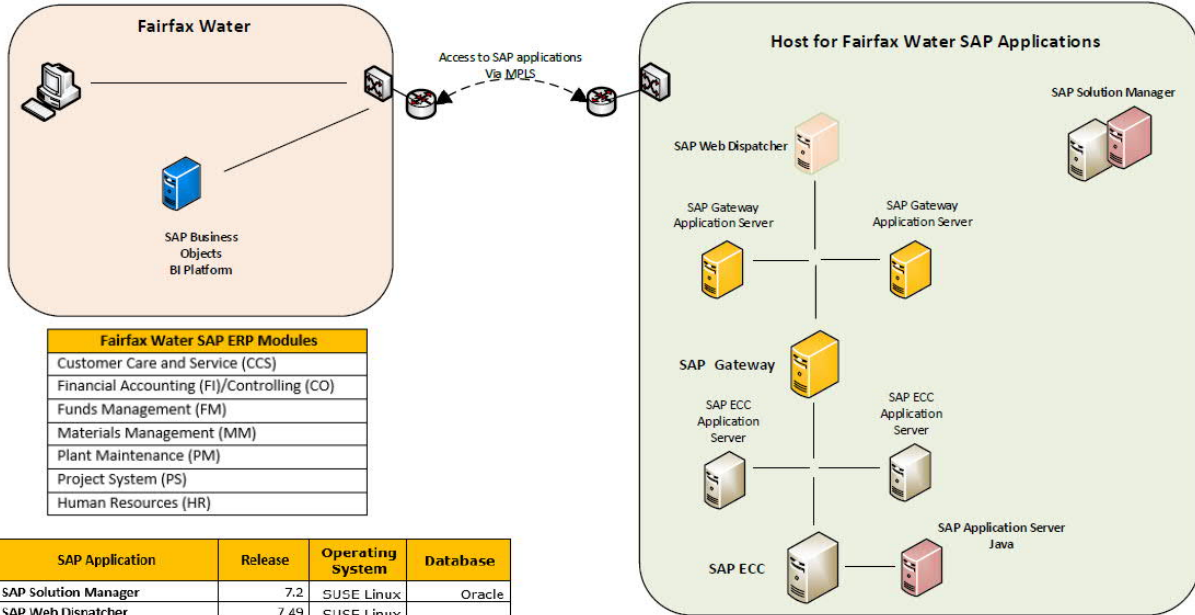
RFP No. 17-79 - Fairfax Water Intranet and Content Migration									
Pricing Response Workbook Rate Card									
INSTRUCTIONS: Please provide your rate card details. Do not provide a blended rate. Please identify each resource and their respective rate.									
#	Role	Total Hourly Rate (Fully Burdened)	Overhead %	Profit %	Hours	Costs	Personnel for RFP Solution	Personnel for Future Phases	Location
1	Examples:					\$ -			
2	Project Manager	\$ 100.00	10%	10%	100	\$ 10,000.00	Yes	Yes	Fairfax, VA
3	Enterprise Architect	\$ 110.00	5%	4%	100	\$ 11,000.00	Yes	No	Arlington, VA
4	Migration Lead	\$ 90.00	10%	10%	100	\$ 9,000.00	No	Yes	Rockville, MD
5	<etc>					\$ -			
6						\$ -			
7						\$ -			
8						\$ -			
9						\$ -			
10						\$ -			
11						\$ -			
12						\$ -			

3 – Pricing Assumptions

RFP No. 17-79 - Fairfax Water Intranet and Content Migration		
Pricing Response Workbook Pricing Assumptions		
INSTRUCTIONS: Please provide the Offeror's assumptions used in the development of the cost estimates.		
The following assumptions should be used in the development of the cost estimates: Please reference contents of the RFP to understand requirements, user base/geographies, and modules needed.		
Offeror MUST clearly list and describe here all assumptions related to its proposal and MUST describe the anticipated impact in terms (e.g., effort, etc.).		
Any assumption that is not listed and agreed upon below will NOT be considered to have an impact on pricing.		
Pricing Assumptions / Rationale	RFP or Proposal Section Reference (if applicable)	Description of Anticipated Impact

Attachment I: SAP Environment, Modules, and Applications
 FW SAP reference information on the platform and modules.

Fairfax Water SAP Applications

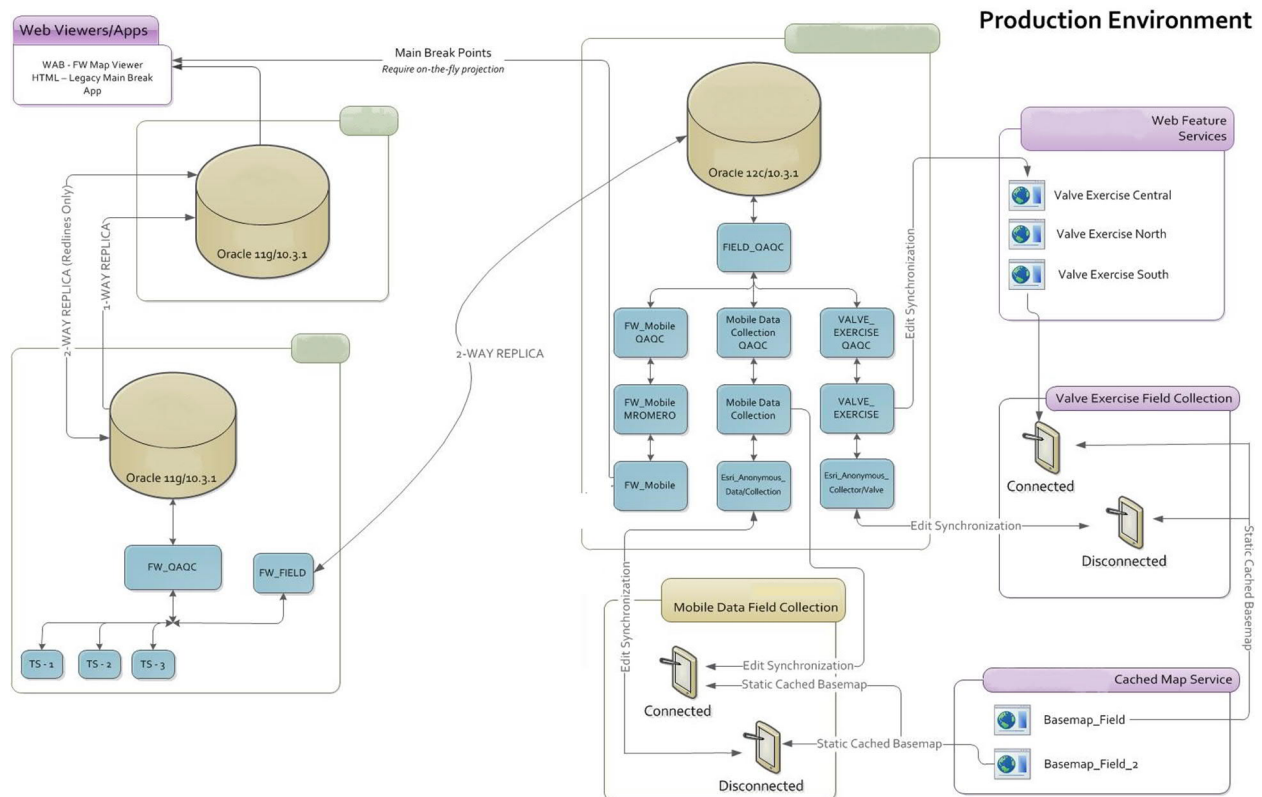


Fairfax Water SAP ERP Modules
Customer Care and Service (CCS)
Financial Accounting (FI)/Controlling (CO)
Funds Management (FM)
Materials Management (MM)
Plant Maintenance (PM)
Project System (PS)
Human Resources (HR)

SAP Application	Release	Operating System	Database
SAP Solution Manager	7.2	SUSE Linux	Oracle
SAP Web Dispatcher	7.49	SUSE Linux	
SAP Gateway	7.4	SUSE Linux	Oracle
SAP Gateway Application Server		SUSE Linux	
SAP Gateway Application Server		SUSE Linux	
SAP ECC	ERP-6 EHP-8	SUSE Linux	Oracle
SAP ECC Application Server		SUSE Linux	
SAP ECC Application Server		SUSE Linux	
SAP Application Server Java	7.4	SUSE Linux	Oracle
SAP Business Objects BI Platform	4.2	Windows	SQL Anywhere

Appendix J: GIS Environment & Use of SharePoint

FW's GIS Environment utilizes is a mixed landscape of ESRI ArcGIS services generally running ArcGIS version 10.5 on Oracle 12g databases. Oracle spatial functionality is not used. Some services such as ESRI base maps utilize cloud services. The environment provides services to various users across different application footprints including web browser, mobile app, and desktop applications. The deployment environment is multi-tier, utilizing data replication across database schemas to maintain the integrity of edits through a controlled reconciliation and post process. Although the diagram depicted below is somewhat out of date, it provides a rough generalization of the GIS data environment and associated flows.



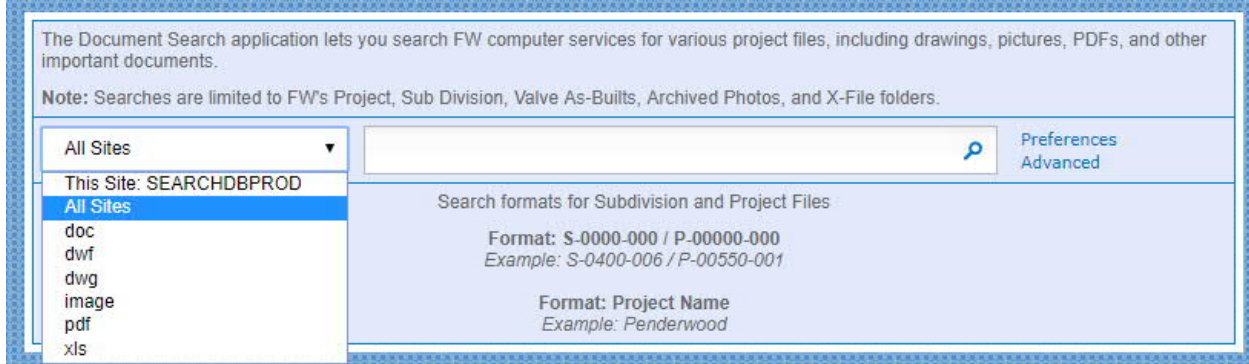
As-Is SharePoint Functionality Utilized in The GIS Environment:

GIS Document Search Functionality (a.k.a. "Document Access Interface") was built for FW by a third-party contractor using Microsoft Search Server 2010 Express. Other features such as document viewing for pdf, dwg, and dwf file types utilize iFilter interfaces from Adobe and iFilterShop. SharePoint Designer was used to build the search front end in the Document Access Interface. The scope of indexing in Search Server Express was expanded to include multiple file shares repositories, each reflecting a distinct type/source of content.

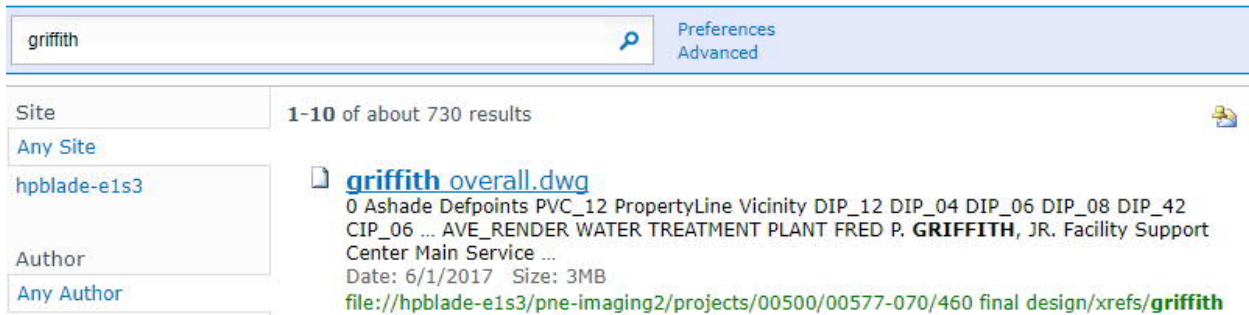
- a. Valve As-builts
- b. Photographs
- c. Project Files
- d. Subdivisions
- e. X-Files

f. Main break pictures

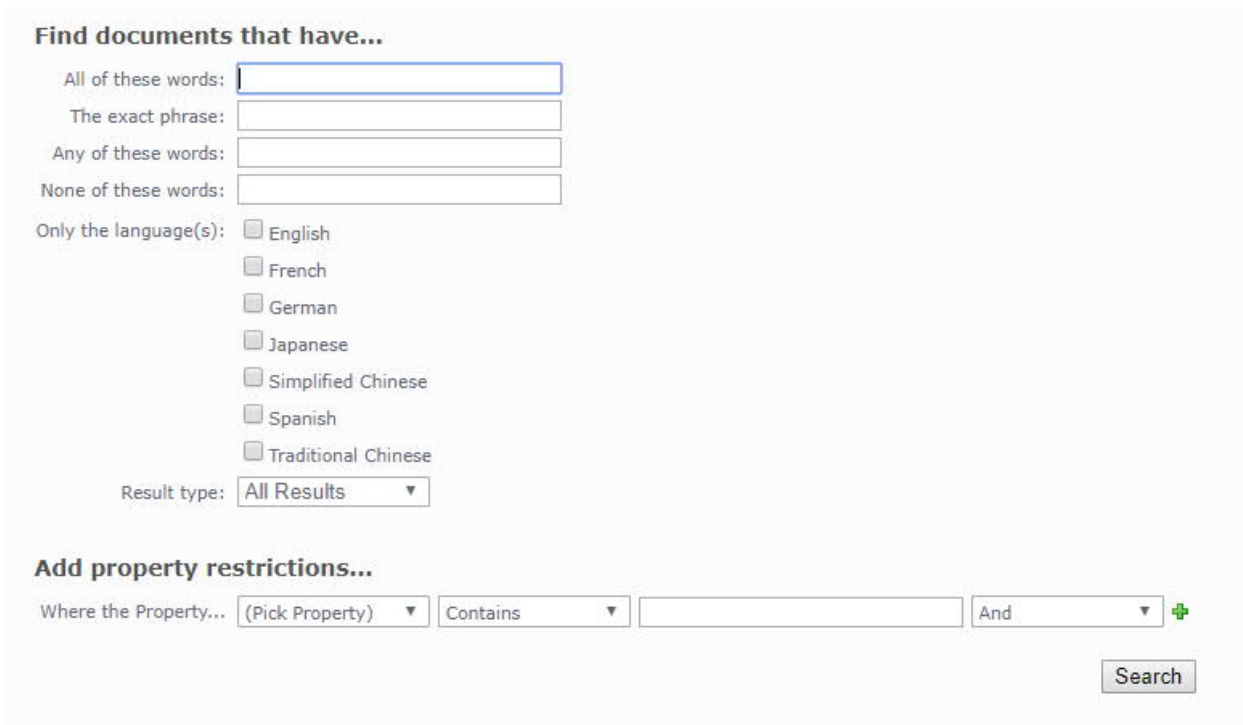
Across these various file shares, the permitted existing crawl and search scope of document types are DOC, DWF, DWG, IMAGE, PDF, and XLS.



GIS Document Search Application – Search Page



Sample Search Result Page



GIS Search - Advanced Search Options Page