



Request for Proposal

Microsoft 365 Migration

Issue Date: March 4, 2024
Submission Date March 27, 2024, at 17:00 EST.

RFP Coordinator:
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1. PURPOSE

1. The Upper Thames River Conservation Authority (UTRCA) invites proposals from qualified vendors, with a preference for Microsoft Partners eligible for FastTrack Deployment, to deliver system integration and implementation services for Microsoft 365. The project's scope involves migrating UTRCA from a GroupWise and Windows environment to the Microsoft 365-hosted email and SharePoint service.
2. The selected vendor will collaborate with UTRCA to assess the current infrastructure's readiness. This involves gathering and documenting requirements, formulating a migration plan, and implementing it accordingly. The vendor's services will encompass migrating approximately 150 mailboxes, calendars, documents, and contacts to Microsoft 365. Additionally, the vendor will establish a new shared directory structure in SharePoint, configure permissions, and assist in relocating existing organizational files from GroupWise and network shares to the newly implemented SharePoint system. The objective is to seamlessly transition to the Microsoft 365 Cloud architecture, ensuring secure and robust access to and from cloud services.

2. BACKGROUND

Introduction:

The Upper Thames River Conservation Authority (UTRCA) stands as one of 36 Authorities in the Province of Ontario, committed to delivering services and programs aimed at protecting and managing the impacts on water and other natural resources. Through collaboration with government entities, landowners, and various organizations, each Conservation Authority tailors its priorities to the specific needs of its watershed environment and residents.

Overview of UTRCA Initiatives:

Established in 1947 with a primary focus on flood control and prevention, a commitment that remains a program priority, the UTRCA's initiatives have evolved over time. Presently, they concentrate on five key areas: protecting people and property, promoting landowner stewardship, providing natural spaces and recreational opportunities, making science-based decisions, and empowering communities and youth.

Location and Workforce Overview:

Situated in London, Ontario, the UTRCA operates in the fastest-growing area in Ontario and the fourth fastest in Canada. The organization employs a diverse array of technical staff, including environmental, water resources, and agricultural engineers, data specialists, terrestrial and aquatic biologists, geographic information systems specialists, ecologists, foresters, hydrogeologists, planners, and modellers. In addition, qualified support staff contribute to finance, marketing and communications, motor pool, and maintenance. The UTRCA's staff complement reflects inclusivity, encompassing women, visible minorities, and members of the 2SLGBTQ+ community.

Current Technology Landscape:

The UTRCA, with approximately 150 PC-based users, currently relies on Novell GroupWise for communication and collaboration tools, including email, calendars, document sharing, and meeting room bookings. Email is archived on-site using NetGovern archives, with limitations due to compatibility with the version of GroupWise. The organization extensively utilizes GroupWise Document Libraries and Windows-based shared drives accessible to all staff, with varying levels of access and organization. Staff have been utilizing MS Teams for meetings and limited Microsoft 365 document sharing.

Transition and Training:

Acknowledging the need for an upgrade, the UTRCA recognizes that the transition away from GroupWise to Microsoft 365 will be challenging for some staff. While newer staff is familiar with the Windows/Microsoft 365 environment, training will be necessary post-migration. The organization seeks the vendor's assistance to ensure a smooth transition for all staff.

Office Software:

Users are allocated a VPC (VMware View) for remote work, accessing GroupWise and network resources. The majority of computers currently run an older version of MS Office, presenting challenges in upgrading due to dependencies on GroupWise and the integrated document management system. After Microsoft 365 setup completion and the migration of all GroupWise library documents, all Office versions will be updated. Adobe Acrobat PDF files play a crucial role, and the organization is reviewing its file retention policy, seeking input on industry standards from the vendor.

Backup System and IT Management:

The complete version of this RFP, containing confidential details, is available upon request to parties submitting a formal Letter of Intent to Bid that includes details about experience relevant to this project along with a website link. Please contact msrfp@thamesriver.ca for access to the full document and to submit the requested information.

IT Management Structure:

UTRCA employs a Systems Specialist (hardware and network admin) and an Information Management Specialist (corporate database systems) and engages an external IT consultant for intricate network solutions. Specialists are also on staff for spatial (GIS) and time series data. The UTRCA will be soon seeking an Information Systems manager and systems support technician.

3. SCOPE OF WORK**The Scope of Work will include:**

The Scope of Work encompasses crucial aspects to facilitate a smooth transition to Microsoft 365. A comprehensive technical document and solution plan will be meticulously crafted to present a clear and detailed strategy, addressing communication and training requirements. The proposed plan includes key components such as an onsite review, identification of potential challenges, recommendations for communication and training, planning for user identity and account provisioning, considerations for synchronization, and specific strategies tailored for Exchange Online migration.

Microsoft 365 Readiness Assessment, Onsite Discovery, and Planning:**1. Onsite Review and Infrastructure Gathering:**

- Conduct an onsite review of current systems to gather comprehensive information about the existing infrastructure.

2. Identification of Potential Challenges:

- Identify potential challenges in the migration process and propose effective solutions.

3. Communication and Training Plan:

- Recommend a robust communications and training plan for UTRCA users. This includes best practices such as in-person training sessions, web-based training, and the provision of desk materials.

4. User Identity and Account Provisioning Planning:

- Develop a plan for user identity and account provisioning to ensure a smooth transition.

5. Directory and Document Synchronization:

- Considerations for implementing directory and document synchronization from the current system into SharePoint.

6. Exchange Online Planning:

- Develop a migration strategy for Exchange Online, including identifying mailbox size and item counts for migration to Microsoft 365.

7. Mail-Enabled Applications and Configuration Planning:

- Determine mail-enabled applications and plan for their configuration in the new system.

8. Bandwidth Assessment:

- Conduct a bandwidth assessment to calculate migration velocity for mailbox data.

9. Integration with MS AD and HR Databases:

- Provide recommendations on integration with Microsoft Active Directory (MS AD) and HR databases, as well as other common staff databases.

10. Implementation Options for MS 365 Applications within VMware View VDI:

- Offer recommendations on implementation options for Microsoft 365 applications within Virtual Desktop Infrastructure (VDI) in the short term, with a longer-term goal of assessing the need for VDI.

11. Integration with GroupWise Archives within NetGovern:

- Assess and recommend strategies for integrating with GroupWise archives within NetGovern or migrating to a more integrated email archive system.

12. File Duplication, Archival, and Access Restrictions:

- Recommendations on reducing file duplication, archival, retention or disposition, and appropriate access restrictions.

13. Teams Implementation:

- Recommendations on cross-organization, organization-wide, and business unit-centric Teams.

14. Security Enhancements:

- Recommendations on how to improve overall system security. Considerations include full implementation of Multi-Factor Authentication (MFA) or alternative security enhancements.

15. Administration Roles and Provisioning:

- Provide assistance in assigning and provisioning administration roles beyond comprehensive administration, including user creation, address book management, bookable resources, shared mailbox, group, and distribution list administration.

Preparing Environment for a Microsoft 365 Deployment

1. Group Policy Implementation:

- Create and implement Group Policy in our Windows environment to align with the Microsoft 365 deployment strategy.

2. Enterprise-Wide Training:

- Implement enterprise-wide training using at least three forms of communication to ensure thorough understanding among employees.

3. End-User Documentation:

- Prepare comprehensive end-user documentation on Outlook and the new Microsoft 365 environment for seamless user adoption.

4. Active Directory Configuration:

- Configure on-premises Active Directory for directory synchronization, laying the foundation for a synchronized environment.

5. Active Directory Federation Services (ADFS):

- Deploy and configure Active Directory Federation Services to enable single sign-on, enhancing user experience and security.

6. Security Model Recommendation:

- Explore and recommend a contemporary organization-wide security model, leveraging Microsoft 365 tools such as Multi-Factor Authentication (MFA) and others.

7. Exchange Online Service Configuration:

- Configure Exchange Online services, ensuring a smooth integration with the existing server and enabling coexistence.

8. Mailbox Quotas and Archival/Retention Policies:

- Establish mailbox quotas and define archival/retention policies to manage data effectively within Microsoft 365.

9. Anti-Spam and Malware Protection:

- Verify the effectiveness of current anti-spam and malware protection, ensuring a secure email environment.

10. Configuration Plan for Client Computers and Mobile Devices:

- Provide assistance and guidance in creating a configuration plan for client computers and mobile devices, optimizing their compatibility with Microsoft 365.

11. Budget Estimates for Licensing Costs:

- Offer budget estimates for ongoing Microsoft licensing costs and evaluate the current licensing structure to ensure efficiency and cost-effectiveness.

Migration and Cutover:**1. Verify User Licenses:**

- Ensure accurate allocation of user licenses to facilitate a seamless transition.

2. Mailbox Data Migration and Synchronization:

- Migrate and synchronize mailbox data to Exchange Online, ensuring the smooth transfer of essential user information.

3. Outlook Web Access and Exchange ActiveSync Configuration:

- Configure Outlook Web Access and Exchange ActiveSync for applicable mobile phones and devices, ensuring comprehensive accessibility.

4. Post-Migration Service Testing:

- Perform post-migration service testing of Microsoft 365 functionality to validate the successful implementation of the migration plan.

Post Deployment Support and Microsoft 365 Administration Training**1. On-Site or Remote Resources:**

- Have resources available on-site or over Teams to augment UTRCA support staff in the 45 days following the completion of the migration.

2. Training Sessions for IT Staff:

- Conduct on-site or webinar training sessions with IT staff to ensure a comprehensive understanding of Microsoft 365 administration.

3. Microsoft 365 Admin Best Practices:

- Share and reinforce best practices for Microsoft 365 administration to optimize the utilization of the platform.

4. Recommendations on Directory Synchronization:

- Provide recommendations on the need for managing DirSync or explore potential upgrades to Microsoft Entra Connect for enhanced directory synchronization.

5. 45 Days of Post-Deployment Support:

- We require the provision of 45 days of dedicated post-deployment support aimed at swiftly addressing any issues or queries that may arise following the implementation phase. This support period is crucial for ensuring the smooth transition and optimal performance of the deployed solution. All support requests during this period should be directed through our IT team.

6. 50 Hours of Service Desk Support:

- In addition to the initial 45 days of dedicated support, we request the allocation of 50 hours of service desk support to be utilized within a 1-year term from the completion of the initial support period. This extended support ensures ongoing assistance and troubleshooting capabilities beyond the immediate deployment phase. All support requests within this timeframe should also be routed through our IT team.

UTRCA environment is as follows and accurate as of December 2023**1. Total Storage:**

- 15TB total. Groupwise data 400GB

2. Total Email Archive Storage:

- 0.5TB

3. Total Licenses (Mailboxes) in Use:

- 153

4. Total Mobile Users:

- 137

5. Types of Mobile Devices:

- Lenovo P16s laptops
- Android and iPhone smartphones
- Some staff use personally owned and managed tablets.

6. Operating Systems:

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7. Employee Locations:

- Watershed Conservation Centre (London): 96
- Fanshawe Conservation Area (London): 10 (Seasonal + 43)
- Pittock Conservation Area (Woodstock): 2 (Seasonal +25)
- Wildwood Conservation Area (St. Mary's): 9 (Seasonal +22)

8. Device Distribution:

- 50% laptops and 50% desktops

9. Meeting Rooms and other Bookable Resources:

- 11 meeting rooms and 15 bookable resources (vehicles and equipment in GW as resource mailboxes).

10. Email Groups:

- 52 email groups
- 28 shared mailboxes

PROPONENT AND SUBMISSION REQUIREMENTS**4.1. MANDATORY REQUIREMENTS****Vendor Certification:**

- The vendor must possess comprehensive Microsoft 365 certifications to ensure expertise and compliance with Microsoft standards.
- GroupWise and NetGovern certification or extensive knowledge are a needed skill-set.

Migration Plan:

- The vendor provides, reviews, revises, and executes a detailed Microsoft 365 migration plan.
- Ensure that the migration plan encompasses all archive and mobile users and their respective data.

Seamless Migration:

- The migration process should be seamless to the business operations.
- Cutover should be scheduled after hours or on the weekend to minimize disruption to daily activities.

Communication and Training:

- The vendor must develop a thoughtful and detailed plan for communication and training.
- Include specifics about how end-users will be informed about the migration, the channels of communication, and the timing of announcements.

End User Documentation:

- The vendor should provide comprehensive end-user documentation.
- Documentation should include:
 - Materials for lunch and learn sessions.
 - Web-based training resources for continuous learning.

4.2. OTHER REQUIREMENTS

Overview of Firm:

- Include the year the business was established and key milestones and achievements.
- Mention any relevant certifications or recognitions related to Microsoft 365 migrations.

Project and Client Management:

- Specify the tools and platforms used for project and client management.
- Highlight any unique or innovative approaches to managing projects and fostering client relationships.

Project Management Team:

- Provide a clear organizational chart showcasing the roles and responsibilities of key team members.
- Emphasize the team's experience with Microsoft 365 migrations specifically.
- Emphasize experience with GroupWise, GroupWise Document Libraries and Netgovern.

Project Schedule:

- Break down the project schedule into milestones with the corresponding dates.
- Clarify the methods and tools employed for project tracking and reporting.

Client Reference List:

- For each client reference, include a brief description of the project, challenges faced, and how they were overcome.
- Ensure that at least one reference is from a project similar in scale and complexity to the proposed Microsoft 365 migration.

Project Costs:

- Provide a detailed breakdown of the cost structure, including any potential additional costs that may arise during the project.
- Clearly outline what is included in the fixed price (e.g., consulting, training, support) to ensure understanding.

Any Proponent who submits a proposal will only do so if they meet the following criteria:

- A duly authorized signing officer of the firm has signed and dated a letter by which they agree to be bound by the proposal and the terms, conditions, and description of services.
- A declaration that the Proponent has not given, directly or indirectly, a benefit of any kind to anyone employed by, or otherwise connected with, UTRCA to receive favourable treatment.
- A declaration that documentation created by the proponent will be compliant with the Accessibility for Ontarians with Disabilities Act (AODA).

5. TIMELINES

Activity	Date and Time
Issue Date of RFP	March 4, 2024
Proponents Deadline for Questions	March 20, 2024, 17:00 EST
Answers to Questions Posted	March 22, 2024
Proposal Submission Deadline	March 27, 2024, 17:00 EST
Evaluation of Proposals	April 9, 2024
Contract Award	April 12, 2024
Draft Migration Plan	30-45 days from contract signing

6. PROPOSAL EVALUATION PROCEDURE

6.1. It must be understood and accepted by any Proponent submitting a proposal that all decisions as to the degree to which a proposal meets the requirements of the RFP are solely within the judgment of the proposal evaluation committee.

6.2. Proponents must respond to this solicitation by submitting all data required herein for the proposal to be evaluated and considered for award. Failure to submit such data shall be sufficient cause for disqualification of a proposal from further award consideration.

6.3. Proposal shall undergo a three-stage evaluation process:

Stage I will consist of a review to determine which proposals comply with all the mandatory requirements.

Stage II will consist of a scoring by evaluation committee of each qualified Proposal based on the Rated Criteria.

Stage III will consist of a scoring of the pricing submitted by Proponents; the evaluation of price/cost shall be undertaken after the review of mandatory requirements and any rated requirements have been completed.

Cumulative Scores

After Stage III, all scores from Stage II and Stage III will be added and subject to satisfactory reference checks and the express and implied rights of UTRCA. The highest-scoring proponents will be selected for the interview stage.

7. PROPOSAL CONTENT & CRITERIA

7.1. EVALUATION CRITERIA

The following is an overview of the criteria and weightings of the rated criteria of the RFP.

CRITERIA	MAX SCORE
A comprehensive Microsoft 365 migration project plan with technical details on how the vendor will migrate current contents seamlessly to a Microsoft 365 environment	15
A comprehensive communication, documentation, and training section in the overall project plan	15
Capability to meet project timelines	15
Product and service history	15
Value/Pricing	40
TOTAL	100

8. PROPOSAL SUBMISSION INSTRUCTIONS

8.1. Proposals are to be sent to:

RFP Coordinator:

Barry Veerkamp

The Upper Thames River Conservation Authority

1424 Clarke Road, London, Ontario N5V 5B9

msrfp@thamesriver.ca

We will accept proposals by email or postal mail. All proposals must be received by March 27 at 17:00 EST. Any proposals received after this date will not be considered.

9. INQUIRIES

All questions and any form of communication regarding this RFP must be directed to msrfp@thamesriver.ca and sent to the RFP Coordinator named on this document's cover page by March 20, 2024 at 17:00 EST. Verbal responses to inquiries are not binding on any party.

All questions and our responses will be distributed to all parties and posted on our website on March 22, 2024 at 17:00 EST.

10. INVESTIGATION OF REQUIREMENTS

By submitting a proposal for the provision of this service, the Proponent represents that they have diligently investigated all conditions that may impact the delivery of the services outlined in this proposal. The Proponent affirms being fully informed about potential conditions, the scope of work, and the associated volume and quantity of tasks to be performed.

11. ACCEPTANCE, AWARD, AND REJECTION

11.1. UTRCA reserves the right to terminate the process without awarding the contract.

11.2. UTRCA reserves the right to accept or reject any part or all of each proposal submission and/or not to make an award.

11.3. UTRCA may negotiate minor adjustments with the selected proponent before the final award of the contract.

11.4. The awarding of the contract is subject to the availability of funds for this statement of work. Should all proposals received exceed the specific budgeted funds and the highest-ranked Proponent's costs are within UTRCA's total current-year budget, we reserve the right to negotiate with the highest-ranked Proponent.

11.5. UTRCA will not be responsible in law or in equity to any proponent for any claim for losses or damages, or any other relief, arising out of the RFP process, including the selection or rejection of any particular section of this proposal.

11.6. UTRCA's interpretation of the contents of the official proposal documents shall prevail.

12. AWARD AND EXECUTION OF CONTRACT

UTRCA will provide written or telephone notice to the successful Proponent advising that their proposal has been accepted.

The successful firm shall be required to enter into a contract with UTRCA.

13. CONFIDENTIALITY

The Proponent shall treat and maintain all information provided by UTRCA in connection with the RFP as confidential.

14. CONFLICT OF INTEREST

The Proponent must disclose in its proposal, and promptly thereafter if made aware at any time thereafter, whether any person who is an employee, officer, or director of UTRCA, or any person not at arm's length from such an individual (as defined in the Income Tax Act, Canada), is or becomes an employee, officer, director, partner, controlling shareholder, broker, or advisor of the Broker. UTRCA reserves the right to consider any such situation as a conflict of interest, providing sufficient grounds to disqualify the Proponent from being awarded the contract.