



Request for Proposal for Migrating from SharePoint 2013 To SharePoint Online

ISSUE DATE: July 18, 2024
PROPOSALS DUE: August 22, 2024



Section 1. Project Overview

Description of Legal Aid Chicago

Legal Aid Chicago is the largest civil legal aid provider in Chicago. We provide free civil legal services to residents of Chicago and Chicago suburbs in Cook County, Illinois. Our staff of over 225 includes approximately 100 full-time attorneys and paralegals who are experts in poverty law. Our holistic legal services allow our clients to get help with multiple legal problems in one place. Since its inception in 1966, Legal Aid Chicago has changed the lives of hundreds of thousands of Cook County's most vulnerable residents, including people who are seniors, disabled, veterans, immigrants, and survivors of domestic violence. Our work is not just a band-aid solution; access to our services can begin the move out of poverty for many of our clients.

Project Summary and Objectives

Legal Aid Chicago is seeking proposals from qualified vendors to migrate Legal Aid Chicago's on-premise SharePoint 2013 infrastructure to SharePoint Online (Microsoft 365).

The objectives of our project are: 1) to improve our current SharePoint system by migrating our existing SharePoint environment to SharePoint Online; 2) to ensure end-user adoption of SharePoint Online; and 3) to leverage record retention functionality in SharePoint Online.

Necessary Experience, Proposal Requirements

The selected vendor must have or provide: 1) a minimum of 5 years of experience in implementing, or migrating to, SharePoint Online Microsoft 365; 2) experience working with civil legal aid organizations or nonprofit organizations; and 3) references from at least three customers for similar projects.

In addition, by responding to this RFP, a vendor is representing they can provide all aspects of the services requested by Legal Aid Chicago in this RFP; they can complete the work by the due dates; and they can present a strong financial position. Proposals must include all information solicited by the RFP and any additional data that a vendor deems pertinent to the understanding and evaluation of its proposal.

Selection Schedule

The selection schedule dates may change at the discretion of Legal Aid Chicago. All dates shown below end as of the of the end of the business day, 5:00 p.m., CST, unless otherwise noted. Any changes to these dates will be communicated by email. Legal Aid Chicago reserves the right to reject all proposals received, or to change the dates listed below, as it deems necessary.



| Milestones | Anticipated Timeline |
|---------------------------|---------------------------------|
| Request For Proposal Date | July 18, 2024 |
| Responses Due | August 22, 2024 |
| Q & A Period | July 18, 2024 – August 22, 2024 |
| Finalists Determined | August 31, 2024 |

Evaluation Criteria

- **Meeting Legal Aid Chicago’s Requirements** - (maximum of 35 points; 35%) How completely do the proposed service meet Legal Aid Chicago’s requirements, as stated in this RFP.
- **Cost** - (maximum of 35 points; 35%) How cost-effective is the proposal.
- **Reference’s Satisfaction** - (maximum of 15 points; 15%) How satisfactory are the references.
- **Vendor Qualifications and Experience** - (maximum of 10 points; 10%) How strong are the vendor’s qualifications and experience.
- **Minority Owned Businesses** - (5 points, 5%) Points for this section will be awarded if the vendor, or vendor’s partner/subcontractor(s), are a female or minority owned business.

Vendors are required to prepare their proposals in accordance with the instructions outlined in this RFP. Failure to follow these instructions may result in rejection. RFP submissions must be written and submitted to Legal Aid Chicago at sharepointonlinerp@legalaidchicago.org no later than 5:00 p.m. Central Standard Time on August 22, 2024.

Section 2. Project Requirements

The existing SharePoint 2013 infrastructure includes multiple work group subsites, a custom home page, and some customization of work group subsites. Each subsite includes one or more document libraries, lists, calendars, and/or other information.

Each user has a Microsoft OneDrive available for their use. Legal Aid Chicago policies provide that a user’s OneDrive is used as a workspace and that “final” versions of documents must be uploaded to the work group libraries in SharePoint 2013 (and in the future, uploaded to SharePoint Online) or to our case management system (LegalServer).

Legal Aid Chicago is currently using a hybrid environment consisting of on-premise Active Directory synchronized to Microsoft 365 utilizing Azure AD Connect. Basic 365 tenant setup is complete, and we are using some services such as Company Portal in Intune for device security (pin/security codes, minimum OS version, Outlook as required email client), email and Teams. Multi-factor authentication has been deployed along with single sign-on (SSO) for many of our



applications using Azure AD. We currently utilize Microsoft's Endpoint Configuration Manager (SCCM) for patch deployment and system imaging.

We support approximately 225 users, all of which have been assigned a laptop and connect via VPN to access on-premise resources. All laptops are Windows 10 with Office 2016 with a few users having already migrated to Windows 11 and Office 365 for testing purposes.

We have an existing SharePoint Online site that we use for training videos and for three project teams who need to share files with individuals and organizations outside Legal Aid Chicago. We already have Microsoft Teams available and in use.

Section 3. Deliverables

The selected vendor will provide the services outlined below.

- Meetings & Coordination
 - Set up a kickoff meeting with project overview summary.
 - Create an implementation and rollout plan.
 - With the help of Legal aid Chicago, identify pilot users to test SharePoint Online.
 - Develop success criteria and UAT (user acceptance testing).
 - Develop a training/communication plan.
 - Implement Microsoft Learning Pathways.
 - Manage meetings, email, coordination, change management.
 - Provide detailed project plans outlining timelines, milestones, and responsibilities.

- Documentation
 - Provide detailed documentation outlining the configuration settings and policies implemented with SharePoint Online.
 - Provide detailed documentation identifying maintenance and updating procedures.
 - Implement reporting and analytics capabilities to track usage, record retention, and compliance with Legal Aid Chicago policies.
 - Develop training materials for IT staff on managing SharePoint Online.
 - Develop training materials for end users on using SharePoint Online.
 - Provide a test plan outlining the testing procedures conducted to validate the functionality and effectiveness of SharePoint Online, along with test reports documenting the results.
 - Provide a transition plan detailing the process for migrating data to the new SharePoint Online environment that includes timelines, responsibilities, and communication strategies.



- Discovery
 - Analyze document management processes.
 - Analyze library and document repository processes.
 - Analyze site information set up and processes.
 - Review existing use of SharePoint, Microsoft Teams, and OneDrive.
 - Analyze security and permissions.
 - Identify incompatible files/file types.
 - Identify file paths that are too long.

- Design
 - Provide site topography, layout, and mapping of existing site data.
 - Develop permissions schema consistent with our Active Directory permissions.
 - Create a migration strategy for our organization and/or work groups.
 - Identify appropriate integration solutions.

- Build
 - Configure SharePoint Online tenant, using our existing SharePoint Online site.
 - Configure the site setup, layouts, and placeholder content.
 - Set up the migration infrastructure and testing processes for our network.
 - Set up integration and data validation processes.

- Testing
 - Perform test migration.
 - Obtain migration acceptance and signoff.
 - Schedule Go Live Date.

- Migration
 - Plan communication to users and execution of migration.
 - Plan training and support for users.
 - Train users before data migration.
 - Perform data migration.
 - Train users after data migration.

Section 4. Current Environment Details

Number of User Profiles: 773

Number of Documents/Files (SharePoint): 783418

Total Data Size: 727.51 GB

Number of Site Collections: 2

Number of Subsites: 52

Permissions Structure: We employ a hierarchical approach, starting with site collections where global administrators have Full Control. Each site within a collection inherits permissions from



the parent site by default, but we break this inheritance to assign unique permissions where necessary. We use predefined permission levels such as Full Control, Design, Edit, Contribute, and Read to streamline management. SharePoint Groups play a crucial role, with default groups like Owners, Members, and Visitors assigned specific roles: Owners with Full Control, Members with Contribute permissions, and Visitors with Read access. Additionally, we integrate Active Directory groups for user management across our SharePoint infrastructure.

Section 5. Proposal Requirements

Effective immediately upon release of this Request for Proposals (RFP) and until notice of contract award, proposals in response to this RFP shall be directed to sharepointonlinerfp@legalaidchicago.org. All official changes, modifications, responses to questions, or notices relating to the requirements of this RFP will originate from this email address.

Proposals must address all the questions and information being requested in this RFP, in addition to affirming that the services required can be provided by your firm.

In addition to the information requested in this RFP, all proposals must include the information described below.

- **Executive Summary.** The Executive Summary shall not exceed one (1) page and shall describe the vendor's ability to meet the requirements of this RFP. Vendors must provide information about their company so that Legal Aid Chicago may evaluate the vendor's stability and ability to support this project.
- **Description of Services.** The Description of Services to be performed must include a detailed approach for migrating from SharePoint 2013 to SharePoint Online, with a description of how you will ensure a smooth transition with minimal disruption to our users.
- **Costs.** All one-time and ongoing/recurring costs and a total cost must be specified. In the event services are provided at no additional cost, the item should be noted as, "no charge." Do not use "To Be Determined" or similar annotations, as Legal Aid Chicago is asking vendors to provide pricing for all desired outcomes with the understanding that they may have to make assumptions. Such assumptions should be stated in this section. Vendors may submit multiple versions of pricing forms to reflect multiple proposal options, if offering multiple options. The pricing forms should be clearly named to distinguish each option.
- **Staffing Plan.** The Staffing Plan must detail the qualifications of staff who are proposed to provide services. If the vendor is using a subcontractor, please include information on subcontracting staff being used and their specific role(s).



- **Timeline.** In this section, the vendor must outline the timeline for this project and must describe their ability to adhere to the anticipated project schedule using the proposed staff.
- **Project Plan.** The Project Plan must include timelines, milestones, and responsibilities, including how you will ensure timely delivery and quality control.
- **Company Profile.** The Company Profile must include:
 - Legal Name
 - Name of Owner(s)
 - Legal Address
 - Federal taxpayer ID
 - Number of Employees
 - Years in Business
 - Approximate Annual Revenue
 - Total Number of Clients
 - Number of Not-For-Profit Clients
 - Number of law firm/legal aid clients
- **References.** Include at least three customers for similar projects, including contact information for at least one individual at each who can speak to your work.
- **Sample Agreements.** Vendors shall provide sample contractual agreements in this part of the vendor's response for all services proposed. In addition, the final agreement between vendor and Legal Aid Chicago shall include the following language:

Indemnity. [Vendor] agrees to release, defend, indemnify and hold harmless Legal Aid Chicago, its governing board, officers, employees, and agents from and against any and all claims, costs, losses, damages, liabilities, expenses, demands, and judgments, including litigation expenses and attorneys' fees, which may arise from [Vendor's] performance under this agreement or negligent acts or omissions of its subcontractors, agents, or employees, including but not limited to, any penalties, claims or damages arising from or pertaining to a breach of this agreement. Such indemnification shall include but shall not be limited to the full cost of any notice to impacted individuals, including the costs to retain an outside consulting firm, vendor, or outside attorneys to undertake the effort.

Insurance. [Vendor] shall carry Professional/Errors & Omissions Liability in the amount of \$1,000,000 to protect Legal Aid Chicago from liability acts of [Vendor]. Upon execution of this Agreement, [Vendor] shall provide a copy of the certificate of liability insurance evidencing the coverage described above. The



policy specified above shall name Legal Aid Chicago as additional insured. [Vendor] agrees to give at least thirty (30) days' notice to Legal Aid Chicago prior to the cancellation, non-renewal or material modification of any such policy.

- **Exceptions and Deviations:** If the vendor finds it impossible or impractical to adhere to any portion of these specifications, the vendor shall so state in this section.
- **Additional Materials:** The vendor may include any additional materials or brochures regarding the proposed services in this section.

All costs incurred in responding to this RFP are solely the responsibility of the vendor. Please submit proposals in a single PDF file as an email attachment to this email address: sharepointonlinerp@legalaidchicago.org.

Section 6. Evaluation of Proposals

Legal Aid Chicago reserves the right to reject any proposals received after the submission deadline, or that are missing any proposal requirements, or that are not adequate for Legal Aid Chicago to reach a judgment about the proposal meeting the needs of Legal Aid Chicago.

At its discretion, Legal Aid Chicago may choose to contact or request to meet with a vendor for an interview, to clarify their response, or to negotiate the contract terms submitted with their proposal.

Legal Aid Chicago reserves the right to make an award without further discussion of the proposals submitted. Therefore, agreements should be submitted on the most favorable terms the vendor can propose.

Legal Aid Chicago reserves the right to accept or reject any proposal or part thereof without assigning any reasons thereof. We also reserve the right to modify any part of the project or the RFP, as well as to negotiate the terms and conditions of the project with the selected vendor.

Selection Process:

Legal Aid Chicago will evaluate each proposal based on the evaluation criteria mentioned above. Shortlisted vendors may be invited for an interview to clarify their proposal and provide additional information if necessary. Legal Aid Chicago will make the final decision on the selection of the vendor.

