

Request for Proposal (RFP) for Microsoft 365 Implementation

Issued by: Kwanlin Dün First Nation (KDFN)

Proposal Deadline: October 27th, 2024, 5:00 PM Yukon Standard Time

1. Addendum to Request for Proposal (RFP) for Microsoft 365 Implementation

1. Deadline Extension

The original deadline of **October 20th, 2024**, was an error. We have extended the submission deadline to **October 27th, 2024**, at 5 PM Yukon Time.

2. Current Environment

- **Exchange Servers:** 2 on-premise Exchange 2019 servers.
- **Microsoft Office Environment:** Microsoft Office 2016 deployed across the organization.
- **File Storage:** On-premise file servers hosting network drives.
- **Collaboration Tools:** No existing tools such as Microsoft Teams, Zoom, or SharePoint.
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3. Target Environment and Project Scope

KDFN aims to modernize its IT infrastructure by transitioning to Microsoft 365, utilizing tools such as:

- **Exchange Online**
- **SharePoint**
- **OneDrive**
- **Power Platform** (PowerApps, Microsoft Forms, Power Automate)
- **Copilot** and other integrated solutions.

The initial assessment (pre-implementation planning) phase will help finalize the roadmap, particularly regarding data management, collaboration tools, and governance.

4. Assessment Phase and Implementation

There will be an **assessment phase** before Phase 1, where the successful vendor will evaluate the current environment and refine the project scope. While we anticipate little change in Phases 1 and 2, certain aspects of Phase 3 will depend on the assessment.

5. Microsoft 365 Tenant and Licensing

KDFN currently does not have an **M365 tenant** or **M365 licensing**. Please include licensing options in your proposal (e.g., E1, E5, Business Licensing).

6. Mailbox Migration

KDFN plans to migrate **300+ mailboxes** to Exchange Online.

7. Post-Deployment Support

The project includes **6 months of post-deployment support** as a warranty period. We expect industry-standard SLAs and ongoing support to ensure a smooth transition.

8. Training Requirements

- **IT Training:** Knowledge transfer during the project and Microsoft-led training for the IT team.
- **End-User Training:** Combination of instructor-led training and a "train the trainer" model for **250+ users**.

9. Governance and Security

The M365 project must comply with KDFN's data privacy requirements, including **ATIPP** and **HIPAA** regulations. A focus on **data governance, retention policies, and classification** is essential.

10. Data Management and Migration

- KDFN has **20 TB of data** stored on file servers. As part of the project, vendors will need to assess where data should reside (e.g., **OneDrive, SharePoint, or remain on-premise**).
- For SharePoint, a framework and governance model will need to be developed compliant with the RIM program.
- Vendors are expected to assist in **data cleanup** and ensure proper storage recommendations are made.

11. On-Prem AD and Azure AD

KDFN currently operates in an **on-prem AD environment**. As part of Phase 3, KDFN will transition to a **Hybrid Azure AD** model. Please include this in your proposal.

12. Backup and Endpoint Management

KDFN uses **Windows Defender** for endpoint protection and **SureMDM** for mobile device management. The MSP will be expected to manage these tools as part of the deployment. Additionally, daily and weekly backups are performed using **Buffalo TeraStation (RAID 5)** units.

13. Legal Compliance

All data storage must adhere to **Canadian data privacy laws including ATIP and HIPMA**, and no offshore storage or processing is permitted.

14. Network and Internet Speed

KDFN's network includes **200 Mbps asymmetrical fibre** service.

15. Integration with Managed Service Provider (MSP)

As KDFN is concurrently seeking an MSP, the successful vendor must work closely with the selected MSP to ensure seamless integration of services and ensure the overall IT environment runs efficiently.

16. Support Scope and SLA Expectations

Please provide details on the support scope and expected SLAs post-deployment. Support should cover all M365 services implemented.

17. Timeline

The draft timeline provided in the RFP is flexible, but **migrating to Exchange Online** remains the top priority. Proposals should include a detailed timeline for implementation.

18. ISP Internet Speed

KDFN's current ISP provides **200 Mbps asymmetrical speed**. All vendors should take this into account for remote deployment, performance considerations, and cloud services.

19. IAM Management and Data Control

IAM (Identity and Access Management) will require a **Single Sign-On (SSO)** solution, including detailed **audit trails**, secure **data management policies**, and **role-based access control** to ensure compliance with internal data governance standards.

20. Volume of Data and Site Creation

No data migration to SharePoint is required. The project will focus on **assessing 20 TB of data** to determine appropriate storage solutions (OneDrive, SharePoint, or remain on file servers). Creating new SharePoint sites is **out of scope**, but **RIM (Records Information Management) frameworks** must be included to ensure proper data handling. Project will ensure setting up proper framework and protocols around Sharepoint and data management that align with our RIM program.

21. Change Management

The vendor must outline a **change management plan** that focuses on increasing user adoption of new tools and explaining the benefits of M365, ensuring a smooth transition for all users.

22. Project Point of Contact

Dave Mavi will be the primary point of contact for the project, supported by two system administrators.

23. Onsite Work

Onsite presence is required during key phases, particularly for assessment and the Exchange Online migration. Remote training can be conducted, but **onsite work must be factored into the proposal**.

24. Exchange Server Public Access

Exchange servers are not publicly accessible, aside from **Outlook Web Access (OWA)**.

25. RIM Compliance and Meta-Data Management

Vendors are expected to include **meta-data classification** solutions as part of the RIM framework for SharePoint, ensuring full compliance with retention policies.

26. Microsoft and Google Tools

KDFN is primarily a **Microsoft environment**, although some departments use Google tools. Proposals should focus on integrating all tools and ensuring compatibility between existing systems.

27. Security Groups and Document Libraries

As part of the assessment, vendors should provide **recommendations for document libraries and security groups** in SharePoint, adhering to industry standards.

28. Licensing

Please include licensing options and costs in your proposal, factoring in the needs for **250+ users**.

29. Backup and Recovery Solutions

Daily and weekly backups are already performed, but vendors should assess the **current backup strategy** and provide recommendations for **Microsoft 365 integration**.

30. Endpoint Management

Vendors will be required to manage **SureMDM** for endpoint devices, particularly mobile devices. Workstation management should also be factored into the proposal.

Thank you for your attention to these details, and we look forward to receiving your proposals by the extended deadline of **October 27th, 2024**.

Prepared by:

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