Kwanlin Dün First Nation

Request for Proposal (RFP) for **Microsoft 365 Implementation**
Deadline: **October 20, 2024, 5 p.m. Yukon Standard Time**

> **Addendum to RFP for Microsoft 365 Implementation - added October 2, 2024**
> Please note the following change to the RFP:
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> The Q&A session for vendors has been rescheduled. The new date and time are as follows:
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> - New Date: October 9th, 2024
>
> - New Time: 11 a.m. – 12:30 p.m. Yukon Standard Time
>
> For any further inquiries or to receive the link to the session, please contact communications@kdfn.net.
>
> We apologize for any inconvenience this may cause and appreciate your understanding.

1. Project Overview

Kwanlin Dün First Nation (KDFN) seeks proposals from qualified vendors for the implementation of **Microsoft 365 (M365)** across the organization. This project aims to modernize KDFN's IT infrastructure through a phased approach, focusing on improving email services, collaboration tools, identity management, and records management practices. The implementation will include **Exchange Online**, **Microsoft Office 365**, **Teams**, **OneDrive**, **SharePoint**, and a hybrid **Azure Active Directory (AD)** model, along with the integration of **Multi-Factor Authentication (MFA)** for enhanced security.

Vendors are encouraged to provide a comprehensive **Problem Statement**, **cost breakdown**, and **implementation plan**. While the outlined phases are a guide, vendors should propose the most effective strategy for KDFN's needs.

2. Scope of Work

Pre-Implementation Planning

- **Assessment**: Conduct a thorough analysis of KDFN's current IT infrastructure, including on-premise **Exchange Servers**, **Active Directory**, file servers, and email systems.
- **Licensing Review**: Evaluate current licenses and recommend necessary licensing for M365 migration.
- **Risk Assessment**: Identify potential risks associated with the migration and propose a mitigation strategy.
- **Future State Roadmap**: Provide a detailed roadmap outlining the transition to M365, including anticipated milestones, challenges, and deliverables.

Phase 1: Migrate On-Premise Exchange to Exchange Online and Microsoft Office 365 Implementation

- **Migration**: Seamlessly migrate KDFN's on-premise Exchange environment to **Exchange Online**, ensuring minimal email downtime.
- **Security**: Implement **spam filtering**, **email encryption**, and **data loss prevention (DLP)** solutions.
- **Microsoft Office 365 Deployment**: Deploy the **latest Office 365 suite** to all users, ensuring full functionality for Word, Excel, PowerPoint, Outlook, etc.
- **Post-Migration Support**: Provide post-migration support, troubleshooting, and user assistance for email and Office 365 functionalities.

Deliverables:

- Full migration to **Exchange Online**.
- Successful deployment of Microsoft Office 365 for all users.
- Documentation on system changes, user permissions, and email workflows.
- User training on new email and Office 365 features.

Phase 2: Teams, OneDrive, and SharePoint Implementation with Advanced Records Management

- **Microsoft Teams**: Implement **Teams** for KDFN, structuring channels, permissions, and collaboration spaces to enhance communication.
- **OneDrive for Business**: Deploy **OneDrive** for secure personal file storage and sharing, training users on privacy and compliance protocols.
- **SharePoint Implementation**: Focus on **advanced records management (RIM)** practices, ensuring **compliance**, **document lifecycle management**, and **data governance**. Implement proper **classification**, **retention schedules**, **metadata management**, and **version control** for secure and organized document management.
- **RIM Focus**: Implement **SharePoint** in a way that complies with KDFN's **Records Management policies**, ensuring secure retention, sharing, and deletion of documents based on compliance standards.

Deliverables:

- Full deployment of **Teams**, **OneDrive**, and **SharePoint** with a focus on compliance, data security, and records management.
- Governance and **Records Management strategy** integrated with SharePoint to ensure legal and policy compliance.
- Comprehensive user training on using Teams, OneDrive, and SharePoint.
- Integration of metadata tagging and versioning into document management processes.

Phase 3: Migration to Azure Active Directory (Hybrid Model) and MFA Implementation

- **Azure AD Hybrid Model**: Migrate to a **hybrid Azure Active Directory model**, integrating on-premise AD with Azure AD for centralized user authentication.
- **Multi-Factor Authentication (MFA)**: Implement **MFA** for enhanced security across all user logins and sensitive data.
- **Security Governance**: Develop governance policies for identity management, data security, and access control to ensure the secure use of M365 across all departments.

Deliverables:

- Full integration of **Azure Active Directory (Hybrid Model)**.
- Implementation of **Multi-Factor Authentication (MFA)** for all users.
- Security governance framework and policies for Azure AD and user access.
- Post-migration training for IT staff and administrators on managing Azure AD and MFA.

3. Governance and Training

- **Training**: Provide comprehensive training for IT staff and end-users on each phase of the M365 implementation.
  - IT staff will require deep-dive training on administering **Exchange Online**, **SharePoint**, and **Azure AD**.
  - End-users will need training on using **Teams**, **OneDrive**, **SharePoint**, and managing records securely within the new system.
- **Governance Development**: Develop **governance policies** for IT operations, focusing on **data governance**, **records management**, **user access control**, and **security compliance** with M365 tools.

4. Submission Requirements

Interested vendors should submit a proposal that includes:

1. **Problem Statement**: Demonstrate your understanding of KDFN's challenges, outlining current IT issues and how they will be addressed with M365.

2. **Experience**: Submit **three references** for projects similar in scope to the M365 implementation described in this RFP. For each reference, include the following details:
   1. **Project Details**: A comprehensive overview of the project, including the objectives, deliverables, and outcomes.
   2. **Scope of Work**: Clearly outline the scope of services provided during the project, highlighting the phases of implementation and any specialized services, such as records management, governance development, or Azure AD integration.
   3. **Client Contact Information**: Provide the name, title, and contact details (email and phone number) of a client representative who can discuss the project's success.
3. **Organization:** Submit an **organizational chart** that details the structure of your team, including key roles and reporting lines for this project.
   1. **Project Team and Experience**:
      Provide detailed information about the **team** that will be assigned to this project. Include:
   2. **Team Member Roles**: Define the roles and responsibilities for each team member assigned to the project (e.g., Project Manager, Senior M365 Consultant, Security Specialist).
   3. **Experience and Credentials**: For each team member, list their relevant experience, certifications, and specific expertise in M365, including any work with public sector or First Nations organizations.
4. **Implementation Plan**: Provide a detailed plan for implementing M365, addressing each phase of the project. If you believe there's a better implementation approach, propose an alternative strategy.
5. **Risk Assessment**: Identify risks and mitigation strategies for the project.
6. **Cost Breakdown**: Provide a detailed pricing structure for the entire project, including licensing, service fees, and ongoing support costs.
7. **Post-Implementation Support**: Outline your support plan for ensuring the solution remains effective after project completion.

5. Project Timeline

Below is a roughly anticipated timeline. Vendors should structure and adjust their project timeline as per their solution and implementation plan:

- **Pre-Implementation** (December 1, 2024 – December 15, 2024)
- **Phase 1: Exchange Online & Office 365** (December 15, 2024 – February 28, 2025)
- **Phase 2: Teams, OneDrive, SharePoint** (March 1, 2025 – April 30, 2025)
- **Phase 3: Azure AD Hybrid & MFA** (May 1, 2025 – June 30, 2025)

Q&A Session: A Q&A session for vendors will be held on **October 3rd, 2024, at 11:00 AM – 12.30 PM Yukon Standard Time**. Email **Communications@kdfn.net** for a link to the session.

6. Current Environment

- **User Base**: Approx. **250 employees** across multiple departments.
- **Technology Landscape**: KDFN currently relies on on-premise **Exchange Servers**, **Active Directory**, and file servers. Users currently face **frequent email outages** and **disparate document sharing methods**, including non-secure platforms like Google Docs and Dropbox, which pose privacy concerns.
- **Challenges**:
  - Lack of a centralized system for communication and document management.
  - Disorganized **records management**, with inconsistent retention and classification practices.
  - Privacy concerns related to using **Google Drive**, **Dropbox**, and **SurveyMonkey** for sensitive citizen data.
  - Email services frequently disrupted due to on-premise server failures.
  - No **standardized collaboration** platform for internal communication and project management.

7. Selection Criteria

Proposals will be evaluated based on the following:

- **Understanding of the Problem**: Demonstrated comprehension of KDFN's IT challenges and the M365 solution.
- **Experience and Expertise**: Experience implementing M365 for public sector or First Nations organizations.
- **Implementation Plan**: Effectiveness of the proposed solution, including risk mitigation and governance strategies.
- **Cost Effectiveness**: Comprehensive and transparent cost breakdown, including total project cost and long-term support.
- **Post-Implementation Support**: The vendor's ability to provide ongoing support and governance to ensure long-term success.

8. Proposal Submission

All proposals must be submitted electronically to **communications@kdfn.net** by **October 20, 2024, 5:00 PM Yukon Standard Time**. Late submissions will not be considered.

We look forward to reviewing your proposal and working together to ensure a successful transition to Microsoft 365 for Kwanlin Dün First Nation.

Proposal Review and Council Approval

All submitted proposals will be thoroughly reviewed by the internal evaluation team, focusing on the outlined criteria including experience, expertise, project plan, and cost-effectiveness. The review process will ensure that all submissions align with the needs and objectives of Kwanlin Dün First Nation's IT modernization initiative.

Once the proposals have been evaluated, a final report will be prepared, including a detailed analysis of costs and benefits for each option. This report, along with the selected proposal, will be presented to the **Council for approval**.

Please note, the project will only move forward upon the Council's final decision. The timeline for the decision will be communicated to all vendors following the proposal review process. Approval by the Council is mandatory before any contract can be awarded or project work begins.

Prepared by:
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