September 13, 2021

<u>NOTICE TO ALL OFFERORS</u>

Gentlemen/Ladies:

AFFILIATED AGENCIES

*Orange County
Transit District*

*Local Transportation
Authority*

*Service Authority for
Freeway Emergencies*

*Consolidated Transportation
Service Agency*

*Congestion Management
Agency*

SUBJECT: Request for Proposals (RFP) 1-3664
 "On-Premise File Share Migration to Microsoft 365"

This letter comprises **Addendum No. 2** to the above captioned RFP issued by the Orange County Transportation Authority (OCTA).

Offerors are advised the proposal due date is extended. The submittal date for proposals are due on or before 2:00 p.m. on September 29, 2021.

Offerors are advised the interview date is rescheduled. The interview date for short-listed firms is rescheduled for October 19, 2021.

The following are the responses to the written questions received on or before September 2, 2021 as stated in the RFP.

Question   1: Can you advise as to how you derived a $80,000 budget for RFP 1-3664 ON-PREMISE FILE SHARE MIGRATION TO MICROSOFT 365. Based upon our experience doing similar work your budget appears to be understated. Will you consider any amount in excess of $80,000 or is this a fixed budget bid?

Response   1: The budget was based upon similar professional service engagements previously procured have done in the past. OCTA is on a budget of $80,000.

Question   2: The RFP mentioned "Onsite resource(s)." Does this mean there needs to be someone on prem? Or is this what work we'd expect OCTA staff to do? The corollary question on this would be if the expectation is for the work to be done for OCTA's staff or to show OCTA's staff how to do the work?

Response   2: Please see the Revised Scope of Work (Exhibit A). The Consultant shall be required to work remotely for the entire engagement. The scope of work does state what will be the responsibility of the Consultant and what is the responsibility of OCTA's staff. This will also be clarified even further during the kickoff meeting.

Question   3: The wording about the Discovery piece makes it appear as though little has been done in this area. Would we be setting up meetings with each department to identify any requirements?

Response   3: Yes, meetings with each department will be required.

Question   4: How much of your O365 environment is prepared? Do we need to step through all the setups/config for Best Practices/OCTA requirements ?

Response   4: Our Office 365 tenant is fully functional and has been for the last four to five years. There will be no need to step through all the setups/configurations. It would be expected for the Consultant to give some guidance to the departments on how to use the file repositories within Microsoft Teams, SharePoint Online, and OneDrive for Business based upon what was gathered during the departmental meetings.

Question   5: With regard to the discovery phase, if it's only OCTA's IT that's ready for the jump to SharePoint/Teams, what issues would the users have with how they currently use their data.

Response   5: The use of Microsoft Teams, SharePoint Online, and OneDrive for Business has been adopted throughout OCTA, not just IT. It will be up to the Consultant to provide feedback after their requirements gathering as to what issues the users may have with moving their data to the Microsoft cloud platforms.

Question   6: Are all active file share users and security groups present within Azure AD?

Response   6: Yes.

Question   7: Is the file share data classified/categorized by a folder structure?

Response   7: No.

Question   8: Is there any desire to add additional classifications/categories?

Response   8: Not at this time.

Question   9: How does OCTA define data that is current? Are the rules applicable to all 76 departments?

Response   9: It is up to each department as to what they consider current.

Question 10: Is there any cross departmental sharing or access required for the data?

Response 10: Yes.

Question 11: Will the less active/current data be migrated to the same repositories as the current data?

Response 11: Yes.

Question 12: Is there any content within the current content structure with unique permissions (not inheriting permission from parent level)?

Response 12: Yes, there may be some.

Question 13: Are the documents in the file share part of reference or supporting documentation to documents stored in the ECM, Teams, or SharePoint already?

Response 13: Yes, there may be some.

Question 14: What is the volume of size is part of the file shares that is part of the migration?

Response 14: As stated in the RFP, approximately 19.5 terabytes of data.

Question 15: Will there be any records management requirements for these documents as part of the migration

Response 15: No.

Question 16: Will there be any purge/clean up of any of the file shares before this project begins?

Response 16: No.

Question 17: Is there a governance document that provides guidance for structured and unstructured content for the organization overall? If not, are there standards that are in place that provide guidance to users on what goes where?

Response 17: No to both.

Question 18: Will the P: drive content be available to all employees with a M365 license?

Response 18: Even though currently the P: drive is mapped for all users, not everyone can get to all folders and/or files due to the various permissions that have been set. That will still hold true once it is migrated.

Question 19: Will the P: drive content be migrated to the existing SharePoint Online Intranet or newly created SharePoint sites? Is moving the P: drive to an organization-wide Team an option?

Response 19: Possibly both. An organization-wide Team can be considered as an option, but the preference would be SharePoint Online.

Question 20: Are there non-native application files (i.e. CAD, binaries, source code, ISOs, etc.) that require UNC paths and cannot be natively accessed/opened in Teams/SharePoint Online? Is it in scope to identify and plan for these files?

Response 20: There may be some of these file types. It would be the responsibility of the Consultant to give guidance on how to best handle these types of files.

Question 21: Will the project include applying sensitivity or retention labels to the migrated file server content?

Response 21: No.

Question 22: How many departments of the 76 have a Teams presence (one or more Teams sites)?

Response 22: At least 90% of them if not more.

Question 23: Does the OCTA want to leverage Azure Information Protection Scanner to identify sensitive content in the file server?

Response 23: Not at this time.

Question 24: Is there a need for SharePoint or Teams end user or administrative training as part of the project?

Response 24: No.

Question 25: Is there a need for Organizational Change Management as part of the project?

Response 25: No.

Question 26: Will Offeror be responsible for fixing broken links with the LinkFixer software or will the Authority perform this work?

Response 26: OCTA's Information Systems (IS) staff will perform this work.

Question 27: Please confirm the network file share data will all be migrated to various Microsoft Teams sites, the underlying SharePoint site on the backend of teams and not a separate independent SharePoint site not linked to Teams.

Response 27: The data may be migrated to the file repositories within Microsoft Teams (which is running on top of SharePoint Online) and there also may be some data migrated to separate SharePoint Online sites.

Question 28: What is the approximate breakdown of the 19TB of data amongst the 9 divisions. How many Teams sites are you looking to migrate this to as 19TB is a large amount of data to be storing in SharePoint on the backend.

Response 28: OCTA does not have that breakdown.

Question 29: Assuming your users currently have network shares mapped for them as drives, how do you plan on having them access the data once migrated. Will they be syncing it locally to their desktops?

Response 29: It will be up to the user whether or not they want to access the files directly from within Microsoft Teams or if they want to sync the folders/files to Windows File Explorer. That practice is already in place at OCTA.

Question 30: Is any of the share data used by line of business applications, to store data or for similar purposes.

Response 30: If that type of data is found it will not be part of this migration.

Question 31: What are the different types of Microsoft 365 licenses (with number) procured?

Response 31: The majority are M365 E3 with a few being at M365 E5.

Question 32: How many users are in the organization?

Response 32: Approximately 1,200.

Question   33: Does any external user have access to file share data?

Response 33: No.

Question   34: Does the 19.5 TB data include data in P: Drive?

Response 34: Yes.

Question   35: File share Data of departments will migrate to either MS Teams or OneDrive for Business, can you confirm if you need it with permissions or without permissions as that of File Share?

Response 35: For data that is to be migrated to OneDrive for Business or Microsoft Teams it will just use the permissions inherent for those applications. For data that may go to SharePoint Online, the permissions from the file share may have to be duplicated in some form.

Question   36: Do we have to consider any data from File Share to skip based on any criteria like file creation date, file type, etc.? Or all data in file share will migrate?

Response 36: The plan is to have the users themselves migrate the data. The Consultant requirements are to define the process and guide them as to how to setup the final home for the data (OneDrive for Business, Teams, SharePoint Online).

Question   37: Have you procured the ShareGate migration tool? Or do you have any preference for the migration tool?

Response 37: See Response 36.

Question   38: Do we have to enable external access on MS Teams or SharePoint Online?

Response 38: No.

Question   39: Any requirement for mapping custom metdata for file share data?

Response 39: No.

Question   40: What will be the suitable time for migration, on weekends only or weekdays in offline hours & weekends?

Response 40: See Response 36.

Question 41: Any governance policy implemented for MS Teams, One Drive for Business and SharePoint Online. If yes, please share details.

Response 41: No.

Question 42: Can we consider Onshore and Offshore resource engagement model for this scope? Is there any preference for Onshore resource or Offshore resource?

Response 42: Onshore required.

Question 43: Is there a requirement for resources to be on site at OCTA or can the project be completed remotely?

Response 43: See Response 2.

Question 44: After the pilot included in this scope, is OCTA's intent to complete the remainder of the migration internally.

Response 44: As defined in the "Implementation" phase, the Consultant shall be required to work with each department assisting them with the Microsoft Teams structure, guidance on where to migrate their data (OneDrive for Business, Teams, SharePoint Online).

Question 45: References - Due to the confidential nature of our security business as well as existing NDAs, we would like to provide anonymized references at this RFP stage, i.e., we would provide project implementation details, but the client would be described, not named, and specific contact information would be withheld for now. Reference calls would be coordinated upon request at down-select. Would this approach be acceptable to OCTA for this RFP?

Response 45: No. Please provide the contact information of all references as requested in the RFP.

Question 46: Is the current budget based on a fully remote project?

Response 46: See Response 2.

Question 47: If on-site is needed, does OCTA have a Travel Policy that would be appropriate to follow?

Response 47: See Response 2.

Question 48: In the above quotation what is your definition of "home directories". Are you implying that each employee's "individual business files" were moved into their individual One Drive account?

Response 48: Yes, the "home" directories were the file shares that were setup for each individual which contain business files for their own use, not share with others. Those file shares were migrated to OneDrive for Business two years ago.

Question 49: Were the files moved into the One Drive accounts curated before the migration to remove redundant and outdated information?

Response 49: No.

Question 50: Where the files transferred with their original folder structure?

Response 50: For the Home Directory migration, yes.

Question 51: Were the incoming files given any additional metadata?

Response 51: For the Home Directory migration, no.

Question 52: Does the organization have policies that control how employees are to use One Drive?

Response 52: No.

Question 53: Is there an established policy for document sharing inside and outside of the organization?

Response 53: No.

Question 54: You also indicate that the "authorities intranet was also recently migrated into SharePoint Online". Please describe the resulting intranet.

Response 54: OCTA's intranet previously resided on our on-premise SharePoint servers. During the last revamping of the intranet, it was imlemented on SharePoint Online versus on-premise.

Question 55: Is the Intranet well adopted? (Scale of 1 to 10)

Response 55: Even though it was stated in the scope of work that OCTA had recently migrated its Intranet to SharePoint Online, this project is not to address the functionality of the Intranet but only provide services for the planning and guidance of migrating the remaining file shares. There may be some files that will be linked to the Intranet, but there will be no need to look at the overall use or revamping of the Intranet.

Question 56: What Departments are using the intranet in a significant way?

Response 56: See Response 55.

Question 57: Is the new intranet already managing a significant number of documents? If so, how many assets are in the new intranet?

Response 57: See Response 55.

Question 58: Has the organization recommended a minimum library structure to be used for all intranet libraries?

Response 58: See Response 55.

Question 59: You also mentioned the "the Authority has been successful with the adoption of Microsoft Teams". Because creating a Microsoft "Team" also creates a SharePoint site (to store the documents passed between individuals during conversations) many organizations can quickly end up with an uncoordinated sprawling collection of SharePoint sites, some supporting their intranet and some supporting team file attachments. Has this happened?

Response 59: There is a number of SharePoint Online sites due to the adoption of Microsoft Teams. At this point OCTA has not seen any issues with it.

Question 60: Have you created multiple Department SharePoint sites that exist only to store documents passed through Teams?

Response 60: No.

Question 61: Do you consider your current intranet to be well architected (a site that supports a Department's communications through "Teams" is also the same SharePoint site that supports that teams document storage, calendar, announcements, and collaboration efforts)?

Response 61: See Response 55.

Question 62: How many SharePoint sites do you have?

Response 62: 82.

Question 63: How many Microsoft "Teams" have been created?

Response 63: 937

Question 64: Do Departments "own" their own sites or does IT retain those responsibilities?

Response 64: Departments own their own sites.

Question 65: What level of employee is allowed to create a new SharePoint site or a new Microsoft Team?

Response 65: Only SharePoint admins and Site Owners are allowed to create a new site. All users are allowed to create Teams.

Question 66: How many individuals are actively doing that?

Response 66: Not sure how many.

Question 67: The RFP mentions "sixty-six (66) unique file shares, and approximately 19.5 terabytes of data". Can you give us an idea of the composition of that data? The reason for the question is, if significant amounts of the data are drawings and specifications it can be very advantageous to store them in a dedicated database and simply connect the SharePoint environment to it. Please elaborate on the composition of the 19.5 terabytes.

Response 67: OCTA does not have that information at this time.

Question 68: Have the documents, that need to be moved into the Intranet, already been "curated" to remove redundant and outdated files?

Response 68: See Response 55.

Question 69: Are the legacy files that need to be brought into the new Internet already tagged with metadata that represents ownership, category, type, and other keywords?

Response 69: See Response 55.

Question 70: Has your organization been using a document classification strategy?

Response 70: No.

Question 71: Has your organization been using a records management strategy with categories and defined retention periods?

Response 71: No.

Question 72: Does the organization have a policy that establishes how files are to be named?

Response 72: No.

Question 73: Is your organization bound by the records management policies mandated for state agencies?

Response 73: No.

Question 74: If so, do you plan to apply these document controls during migration?

Response 74: This question does not apply.

Question 75: What is the organization's strategy for helping "Intranet Search" to find newly imported documents?

Response 75: See Response 55.

Question 76: Does the structure of your current intranet support the Division/Department structure? Have you implemented sites for each department in each Division?

Response 76: See Response 55.

Question 77: Ultimately, what group of representatives or which individual "owns" the responsibility for the effectiveness of the resulting intranet?

Response 77: See Response 55.

Question 78: What is the organization's expectation as to the hours their own personnel will be made available to assist in this project?

Response 78: As stated in the scope of work, OCTA will assign one (1) in-house Project Manager along with making sure that its technical team, which includes both our Server Administrators and Desktop Technicians will be available for the duration of this project. Department leads will also be made available for the various interview meetings.

Question 79: Please describe the organization's vision for the resulting intranet and file transfer solution at the end of the project.

Response 79: See Response 55.

Question 80: Is the environment facilitating communications and allowing documents to be passed back and forth without email?

Response 80: With the adoption of Microsoft Teams additional forms of communications are being used along with email.

Question 81: Are people relying more on the SharePoint department sites acting as their "digital office"?

Response 81: That would be part of what would come out of the departmental meetings.

Question 82: Is marketing constantly releasing initiatives that build awareness and cooperation?

Response 82: See Response 81.

Question 83: Is HR providing a wide range of documents to all employees?

Response 83: See Response 81.

Question 84: Is Engineering the dominant department with terabytes of easy to find drawings and data?

Response 84: See Response 81.

Question 85: How many user Active Directory domains are represented?

Response 85: One.

Question 86: Are all users in the Office 365 tenant already?

Response 86: Yes.

Question   87: Do any sites have slow network connections?

Response 87: No.

Question   88: Are any very large files in use?

Response 88: There may be some large files.

Question   89: Is there any interest in an Azure serverless file share instead of SharePoint?

Response 89: No.

Question   90: Are any files shared outside the Agency with other Office 365 tenants?

Response 90: No.

Question   91: Are nested groups being used for permissions?

Response 91: Yes.

Question   92: What is the total size of current network share files (in GB)?

Response 92: Approximately 19.5 terabytes.

Question   93: Do you also want to migrate over the permissions from network share to SP / Teams?

Response 93: See Response 35.

Question   94: Do you want to retain the metadata during the migration?

Response 94: Retaining the metadata is preferred if possible.

Question   95: Any preferred migration tool – do you have any tool for this migration?

Response 95: OCTA's users will complete the data migration, no migration tools will be used.

Question   96: Assuming SP and Teams are already setup, do you also need help setting up Governance around SP & Teams or is it just confined to migration of content?

Response 96: Just confined to the guidance on migrating the data.

Question 97: Any migration also needs to be done to OD4B or is it just to SP & Teams?

Response 97: Based upon the guidance and recommendations given by the Consultant during the engagement, OCTA's users will then decide where to migrate the data to. It is possible that the date will be migrated to OneDrive for Business as well as Microsoft Teams and SharePoint Online.

Question 98: Is the data cleaned up from File share and all data needs to be moved? Or the clean-up exercise would be part of the Project?

Response 98: OCTA's users will be responsible for decided what data to migrate.

Question 99: Do you just need the plan and roadmap for the migration? Or do you need us to do the migration as well apart from the roadmap and plan?

Response 99: OCTA's users will be migrating the data.

Question 100: As premigration Accomplishments, it mentioned some of the departments have been migrated to one drive on teams. Do we need to do the migration for all the 76 department or exclude the one who are already migrated and how many such departments already migrated?

Response100: All departments will need to be assessed.

Question 101: The provided budget is an indicative budget or not to exceed?

Response101: Not to exceed.

Question 102: The number of users was stated as over 1000, is there a number of users accounts that can be stated for the project?

Response102: See Response 32.

Question 103: Was a governance exercise completed prior to implementing SharePoint Online and if so, what type of documentation resources are available?

Response103: No

Question 104: Do you have an IT Governance Committee? If yes, is it made up of only IT people, or are LOB Directors involved, number of members/groups?

Response104: No.

Question 105: How many departments, like HR, will need compliance, DLP, PHI, retention or other policies defined?

Response105: OCTA does not have that information at this time.

Question 106: Is there any type of Content that cannot or shouldn't be stored in SharePoint without specific guidance? (e.g. regulated documents? Official records?)

Response106: No.

Question 107: Do you have any Content Retention, Expiration or Archive policy?

Response107: No.

Question 108: How many connected applications do you have to SharePoint?

Response108: None.

Question 109: Do we anticipate any connections or systems breaking with our migration to the SharePoint Online?

Response109: No.

Question 110: How many sites/collections do we have for Teams / SharePoint?

Response110: OCTA does not have that information at this time.

Question 111: What is the number of files to be migrated?

Response111: OCTA does not have that information at this time.

Question 112: Does your department use any external sharing solutions (Google Drive, DropBox, Other, etc.) and will they be part of the migration and will they be part of the project?

Response112: They do but that will not be part of this project.

Question 113: Does your department have any custom integrations or solutions you leverage with SharePoint?

Response113: Yes

Question 114: Has your department customized SharePoint any such as adding forms, processes, workflows, etc.?

Response114: Yes

Question 115: It was stated that there was approximately 19.5T of data, is the expectation that all the data will be moved as part of the implementation OR has an Archive strategy already been examined for stale data? Is there an estimated minimum amount of data that will need to be migrated?

Response115: It will be up to each department to decide what data will be migrated. An archive strategy has not been developed nor has there been any examination for stale data.

Question 116: It was stated that the Desktop Support group had purchased the LinkFixer software to address possible issues with embedded links, can you describe any details discovered for potential data migration challenges / roadblocks?

Response116: The Desktop Support team has test the use of LinkFixer and has not seen any possible issues but that was only done on a few test files.

Question 117: Is there a preference or requirements around off-shore or on-shore resources for the project?

Response117: See Response 42.

Offerors are reminded to acknowledge receipt of this Addendum No. 2 in their transmittal letters and Exhibit B, entitled "Price Summary Sheet." All changes addressed in this Addendum No. 2 shall be incorporated into the final Agreement.

Questions regarding this Addendum No. 2 should be directed to the undersigned at (714) 560-5644.

Sincerely,

Donald Herrera
Contract Administrator
Contracts Administration and Materials Management

SCOPE OF WORK

On-Premise File Share Migration
To Microsoft 365

BACKGROUND

The Orange County Transportation Authority (Authority) is a state-mandated, transportation agency that brings together all the public entities charged with planning and operating transportation in Orange County, California. The Authority sets transportation priorities, makes countywide spending decisions based on these priorities, plans and funds major highway & freeway projects and street improvements, operates Orange County's public transit systems and provides paratransit services. As one (1) agency, the Authority provides Orange County with a single point of accountability and a greater voice for local residents for all transportation issues.

The Authority's Information Systems (IS) Department is responsible for all computer related operations at the Authority including applications development, IS planning, User services and technical services.

The Authority's distributed computing future is best built on a modern, integrated network architecture that incorporates best-of-breed, file, print, application, messaging, and Internet/Intranet services.

The IS Department supports the computing needs of over 1,000 users spread out over five (5) locations in Orange County. The IS Department provides the technical infrastructure that hosts, maintains and supports over ninety (90) business applications of which eleven (11) are considered mission critical. IS also provides professional project management services that ensure proper resources and expectations are met for technology projects, and desktop training services so that its users can optimize their use of desktop computing tools.

As part of the IS Strategic Plan, the department is always looking at the most efficient ways to provide services to its business units. One (1) area that IS has been moving forward with is the use of cloud computing, more specifically the use of Microsoft's cloud services with Microsoft 365.

OBJECTIVE

The Authority is seeking an Information Technology (IT) Consulting Firm (Consultant) to provide planning and implementations services for the migration of the Authority's on-premise file shares to Microsoft Teams and SharePoint Online. Consultant shall have completed on-premise file share migrations to the cloud for clients similar in size to the Authority.

To date all user home directories have been migrated to Microsoft OneDrive for Business. The Authority's Intranet was also recently migrated to SharePoint Online. The Authority

has also been successful with the adoption of Microsoft Teams, especially while working remote due to the COVID pandemic.

The Authority will assign one (1) in-house Project Manager along with making sure that its technical team, which includes both our Server Administrators and Desktop Technicians will be available for the duration of this project.

The major objectives of this engagement will be to:

1. Assess the existing on-premise file shares

2. Interview departments for an understanding of their use of the departmental and Authority wide file shares along with their current use of Microsoft Teams

3. Assist departments in setting up the proper Microsoft Teams structure to incorporate the data from the existing departmental file shares

4. Create the process for departments to migrate their departmental file shares to Microsoft Teams or possibly OneDrive for Business and to migrate their data from the Authority wide file share (P: drive) to SharePoint Online.

The plan would be to have the Authority's users complete the actual file migrations. The consultant's responsibility is to assess the current environment, interview the departments, assist with setting up the proper structure in Microsoft Teams and SharePoint Online, and providing the methods and best practices for migrating the data.

The consultant will be required to perform this entire engagement remotely. Microsoft Teams will be used for all meetings.

CURRENT ENVIRONMENT

<u>Organizational Structure</u>

The Authority is made up of the nine (9) separate divisions that report directly to the Chief Executive Officer. The nine (9) divisions are broken down into seventy-six (76) departments.

<u>Technical Infrastructure</u>

The Authority's on-premise file shares consist of ten (10) Microsoft Windows servers, sixty-six (66) unique file shares, and approximately 19.5 terabytes of data.

The majority of the Authority's users have Microsoft 365 E3 licenses with a small portion (less than 50) with Microsoft 365 E5 licenses.

PRE-MIGRATION ACCOMPLISHMENTS

As stated earlier, all the user home directories have been migrated to OneDrive for Business. A few of the departments (including IS) started moving data from their departmental drives over to the file repositories within Microsoft Teams.

The Desktop Support group has also tested and purchased the LinkFixer software in order to address possible issues with embedded links.

SCOPE OF WORK

The following methodology shall be adhered to for Office 365/Exchange Online migration project:

- **Initiation** – Detail project processes, define roles and responsibilities, and baseline project work plan.

- **Discover** – Assess current system state and understand functional and technical requirements according to key business goals and objectives.

- **Implementation Strategy** – Develop "road map" for the full migration of the on-premise file share data

- **Pilot** – Deploy solution to a small and controlled user group at the OCTA administrative building to validate implementation approach and eliminate surprises and other risks.

- **Implementation** – Implement the migration strategies for all departments.

- **Project Closure** – Facilitate successful completion of the project through formal sign-off of deliverables and "lessons learned".

Consultant shall be required to include a project plan detailing each of the appropriate phases of the project along with the number of resources that shall be part of the engagement at any given time. Consultant shall also be responsible for indicating what resources shall be needed and when from the Authority (staff, hardware, software, etc.).

Consultant shall be required to create and maintain all pertinent documentation. All documents must be in Word, Excel, Visio, Project, and PDF format. A master electronic copy shall be maintained on-site at the Authority.

Pricing, along with estimated man hours, must be broken down by the high-level phases/tasks of the project and this information is to be provided as part of the Work Plan section of the Consultant's proposal.

Task 1 – Initiation

This is the most critical of all project phases because it provides the vision for how the Consultant's project engagement shall fulfill the Authority's goals. In this phase, project processes are focused on defining objectives and constraints; identifying project risks and response strategies; setting expectations; leveraging best practices and establishing mutual consensus on critical project policies and procedures.

Project initiation ensures an integrated and comprehensive project schedule and plan.

Deliverables:

Facilitate a kick-off meeting to achieve the following goals:

- Define roles and responsibilities between Authority and Consultant project team members.

- Define a comprehensive list of constraints that need to be considered in the baseline project schedule.

- Establish task and deliverable priorities.

- Baseline project schedule to measure team progress and critical milestones.

- Establish expectations for deliverable content and level of detail.

This phase takes a partnership approach to the overall project, where Consultant and Authority resources work together to develop a comprehensive project overview. Consultant shall facilitate sessions with Authority technical resources to discover all aspects of the project from requirements gathering through pilot and deployment.

The Project Initiation step shall achieve the following goals:

- Consultant and Authority shall mutually agree upon the scope of each project phase.

- Roles and responsibilities shall be negotiated and agreed upon.

- A comprehensive listing of associated tasks shall be compiled for each phase.

- Prioritization of tasks and determination as to whether the task is essential for project success or could be deferred if deadlines slip.

- Detailed project plans shall be created for each phase of the overall project.

- Consultant and Authority resources shall be assigned to previously identified tasks.

- Milestones and deadlines shall be established, especially as they relate to critical Authority business constraints.

Task 2 – Discover

During the discovery phase of the project, Consultant's engagement team shall work with the Authority's migration team in assessing the current on-premise file shares.

Consultant shall also review both the geographical components of the Authority along with the underlying organizational structure to better understand the requirements for the migration of the data to Microsoft 365.

Deliverables:

- **Current State** – Consultant shall deliver documentation listing their understanding of the on-premise file shares and how they are provisioned throughout the Authority. Consultant shall also document their understanding of how the Authority currently uses Microsoft Teams, SharePoint Online, and OneDrive for Business.

- **Updated Project Plan** – Based upon the results of the discovery phase, the master project plan shall be revised accordingly.

Task 3 - Implementation Strategy

Consultant shall work with the Authority's migration team to develop a plan to determine the best approach for implementing all the various phases migrating the on-premise file shares. The plan shall include the type of structure recommended for each department to have within Microsoft Teams and the steps that shall be taken by the end users to migrate their data. The preference would be to have the departments focus on current data first and then eventually migrate older, seldom used data.

Deliverables:

- **Implementation Plan** – Consultant shall develop and document the implementation strategy.

Task 4 – Pilot

Consultant shall be responsible for deploying the solution to a small and controlled user group (a single department) at the OCTA administrative building to validate implementation approach and eliminate "surprises" and other risks.

The pilot shall also include migration processes which will be completed by the users and the Authority's migration team. The processes can then be reviewed and improved prior to doing the actual production implementation.

Deliverables:

- **Pilot Script** – Consultant shall deliver a pilot script that will be followed by both the migration team and the pilot users. The script shall include steps for the migration.

Task 5 – Implementation

Based upon the documented results from the Pilot phase, Consultant shall finalize the migration strategies and deploy the solution to all of the departments.

Consultant shall then work directly with the Authority's migration team in completing the necessary migration tasks based upon the final Design/Implementation documentation.

Deliverables:

- ▪ **Final Implementation Plan** – Consultant shall deliver a detail document describing the roles and responsibilities of each migration team member, pre-implementation tasks, implementation tasks, and post-implementation tasks. The master project plan shall also be revised prior to the actual implementation.

- ▪ **Actual Implementation** – Consultant shall work each department assisting them with the Microsoft Teams structure, guidance on where to migrate their data (OneDrive for Business, Teams, SharePoint Online).

Task 6 – Project Closure

In this phase, project processes are focused on measuring and validating that the project vision and goals are realized.

Deliverables:

- ▪ **Formal Document Update and Review** – Consultant shall deliver all documents in order to update associated project information initiated during each project step that will be accepted, via sign-off, by key Authority project personnel.

- ▪ **Lessons Learned** – Consultant shall facilitate a session to gather feedback from Authority project personnel and stakeholders concerning the positive and negative events of the project. Using this information, the Authority can review project processes and procedures to insert improvements for subsequent projects.

- ▪ **Project Closure Agreement and Acceptance** – Complete a closure and acceptance agreement that demonstrates Authority's final acceptance of the project.

- ▪ **Project Binder** – A comprehensive project history that shall include an updated project schedule, status reports, change requests, issues log, and a compilation of project deliverables.