

# RFP 31926C – Pre-Proposal Conference Meeting notes:

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- **SharePoint Online Migration Requirements:**

Ev Placencia, the CIO, outlined the court's need for an integrator to upgrade their legacy on-premises SharePoint site to SharePoint Online, emphasizing the desire for modern, custom templates and a solution that empowers content owners in each division, with Sabrina leading the project sponsorship.

- **Migration Scope and Approach:** Ev Placencia clarified that the migration will not be a direct copy-paste of the existing 2005 on-premises SharePoint site, but will require evaluation of current content, recommendation of a migration path, and proposal of modern templates tailored for approximately 500 users and a dozen departmental or divisional sites.
- **Template and Customization Needs:** Ev Placencia specified the need for integrators to provide and implement customizable templates for each division or department, allowing content owners to manage their own areas, and stressed the importance of a modern, non-generic SharePoint Online experience.
- **Support and Transition Preferences:** Ev Placencia indicated openness to proposals that include a support period for transition to the new environment, but stated that ongoing support should not be a mandatory requirement of the solution.
- **Remote and Offshore Resource Acceptance:** Ev Placencia confirmed a preference for remote resources and stated that offshore teams are acceptable, provided that appropriate security protocols for environment access are followed, as this approach is considered cost-effective and has been used previously.

- **Technical Environment and Integration Details:**

Ev Placencia responded to questions from Krishna Gudipati, Yonatan, and Socrates regarding the existing Microsoft 365 G5 subscription, authentication setup, environment provisioning, and integration expectations, confirming readiness for dev/test/prod environments, Azure AD single sign-on, and limited integration requirements.

- **Microsoft 365 Subscription Status:** Ev Placencia confirmed that the court has an active M365G5 subscription, which will be leveraged for the SharePoint Online migration and related services.
  - **Environment Provisioning:** Ev Placencia stated that the team expects the integrator to set up development, QA, and production environments using appropriate naming conventions, and that this is a required part of the final solution.
  - **Authentication and Security:** Ev Placencia explained that Azure AD is already configured, with single sign-on and password authentication in place, and that no additional authentication integration is needed for the new SharePoint tenant.
  - **Third-Party Migration Tools:** Ev Placencia approved the use of third-party migration tools such as Sharegate, but reiterated that only select files may be migrated due to the age and static nature of the on-premises content.
  - **Integration with Other Systems:** Ev Placencia clarified that there are no current third-party integrations with the on-premises intranet, and that no direct integrations with other Office 365 services are required for this project.
- **Governance, Compliance, and Data Protection:**

Ev Placencia addressed governance, compliance, and data protection questions from Sameer, Richard, Krishna Gudipati, and Socrates, confirming the absence of detailed governance policies, openness to integrator recommendations, and that no court records or sensitive compliance data will be stored in SharePoint Online.

- **Governance Policy Status:** Ev Placencia acknowledged the lack of a formal governance policy for SharePoint Online and expressed willingness to follow best practices and integrator recommendations, including role-based access control and security group management.
- **Data Protection and Compliance:** Ev Placencia confirmed that data protection and compliance responsibilities fall under their purview, and that while due diligence was performed for Copilot adoption, further compliance measures and retention policies should be considered as part of the engagement.
- **Court Records and Sensitive Data:** Ev Placencia clarified that SharePoint Online will not serve as the repository for court records or sensitive files, as these are stored in separate systems with different partners, and that the intranet will only host general documents such as finance and HR files, which are not subject to DOJ or CJIS compliance.
- **Retention Policies and Future Compliance Tools:** Ev Placencia stated that while no records management is currently required, retention policies should be reviewed, and future integration with Microsoft Purview or other compliance tools may be considered as part of the engagement.

- **Adoption Strategy and Success Criteria:**

Sameer and Ev Placencia discussed the importance of user adoption and success criteria, with Ev emphasizing the need for ease of use, modern design, and maintainability, and requesting that adoption strategies be included in proposals.

- **Adoption Strategy Inclusion:** Ev Placencia requested that integrators include a user adoption strategy in their proposals, noting that the court is aware of the upgrade but not the specifics of the new SharePoint Online environment.
- **Success Criteria Definition:** Ev Placencia defined success as a solution that is easy for customers to use and maintain, visually appealing, and governed by best practices, with content owners managing their own areas using provided templates.

- **Site Structure and Design Review Process:**

Sridhar and Kin inquired about the envisioned site structure and design review process, with Ev Placencia describing a functional layout by division or program and confirming that design reviews will be conducted by Sabrina, Ev, IT members, and possibly senior leadership.

- **Site Layout and Divisions:** Ev Placencia explained that the intranet will feature a landing page with navigation to division- or program-specific sites, estimating around a dozen such areas based on the court's organizational structure.
- **Design Review Process:** Ev Placencia stated that design reviews will be handled by Sabrina, Ev, and a few IT team members, with potential input from senior leadership, but not requiring approval from a larger department or division.

- **Workflows, Forms, and Document Libraries:**

Shirish, Inderjeet, and Ev Placencia discussed the current and future use of workflows, forms, and document libraries, confirming that only static PDF forms and basic document libraries exist today, with no automated workflows planned for this engagement.

- **Current Workflow and Forms Usage:** Ev Placencia stated that the current intranet contains only static PDF forms and no automated workflows, and that these forms will be migrated as-is to the new environment.
- **Future Options for Forms and Flows:** Ev Placencia suggested that the creation of web forms or automated flows could be included as optional line items in proposals, allowing the court to consider these features for future adoption.

- **Document Library Size:** Ev Placencia estimated that the largest document library or list would contain 40-50 documents, indicating a relatively small data footprint for migration.

- **Teams and SharePoint Integration:**

Socrates, Kiel Brian, and Ev Placencia clarified the relationship between Teams and SharePoint, confirming that Teams integration is not a requirement for the intranet, and that Teams is used for court hearings but not for storing records or integrating with SharePoint Online.

- **Teams Integration Requirements:** Ev Placencia stated that integration between SharePoint Teams sites and the intranet is not required, but could be considered if it adds value; users may access SharePoint via Teams if desired.
- **Teams Usage for Court Hearings:** Ev Placencia confirmed that Teams is used for remote court hearings and arraignments, but no transcription or note-taking features are used, and these activities do not intersect with SharePoint Online.

- **Project Timeline, Budget, and Vendor Information:**

Chinwe, Sameer, and Collin asked about the project timeline, budget, and incumbent vendors, with Ev Placencia confirming a flexible timeline based on integrator proposals, available budget, and no incumbent vendor, while Collin provided deadlines for submitting further questions.

- **Project Timeline Flexibility:** Ev Placencia stated that the period of performance will be determined by the integrator's proposed timeline, with no fixed deadline, and that the court has resources available to support onboarding.
- **Budget and Incumbent Vendor Status:** Ev Placencia confirmed that the project is budgeted, but declined to disclose the budget amount, and stated that no incumbent vendor has been used for this project.
- **Question Submission Deadlines:** Collin announced that additional questions should be submitted via the solicitations mailbox by April 3rd, with answers to be posted by April 8th.

- **User Permissions and Team Creation Controls:**

Yonatan and Ev Placencia discussed current user permissions, with Ev confirming that users can currently create their own Teams, and expressing openness to implementing controls and guidance to manage this in the future.

- **Current Team Creation Permissions:** Ev Placencia acknowledged that users are currently able to create Teams and spin up collections, and indicated willingness to restrict this capability with appropriate guidance as part of the new solution.

### Follow-up tasks:

- **Vendor Attendance Documentation:** Compile a list of attending vendors using the company names provided in the chat for roll call and reference. (Collin)
- **Post-Meeting Q&A:** Create and post a document with answers to additional questions submitted via the solicitations mailbox after the meeting. (Collin)