

# Superior Court of California County of Santa Clara

191 North First Street  
San José, California 95113  
(408) 882-2700



FINANCE / GENERAL SERVICES DIVISION

Date 4/8/2016

## **ADDENDUM # 1**

Intranet Modernization Using M365 G5 SharePoint Online

REQUEST FOR PROPOSAL (RFP) # 31926C

<b>Item</b>	<b>Vendor Question (Q)</b>	<b>Official Court Response (A)</b>
1	Are all the user assigned licenses?	Yes
2	Should the intranet support external user access, or will it be limited to internal users within the organization?	Internal only
3	Which Power Platform licenses (Power Apps, Power Automate, premium connectors, etc.) are currently provisioned in your tenant?	M365 G5
4	Is there an approved homepage design/wireframe available, or should the vendor propose and design it?	Vendor propose & design
5	Are designs available for division/department pages, or should the vendor create them?	Vendor create
6	Should the implementation use only out-of-the-box SharePoint components, or are custom (SPFx) components expected?	Custom expected
7	Are there defined branding guidelines (themes, fonts, colors) to be applied?	NO
8	Is multi-language support required?	NO
9	Do you require a reusable department site template for future site creation?	Yes
10	Should all department/division sites follow a standardized layout?	Yes
11	Do you want automated site provisioning for new departments?	Ideally
12	Should news/announcements require an approval workflow before publishing?	Optional
13	Should document libraries be structured using metadata, folders, or both?	both

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14	Are there existing managed metadata term sets already defined?	No
15	Should document approval workflows be implemented?	Optional
16	Do you require custom search configuration or Out of box search is fine?	Robust search needed
17	Should Power Automate workflows be included (e.g., approvals, notifications)?	Optional
18	What is the approximate number of documents and total data size to be migrated?	No migration requirements (minimal)
19	Should content be migrated as-is or undergo cleanup before migration?	Clean-up
20	Should metadata and permissions be preserved during migration?	No
21	Do you require migration validation reports and logs?	No
22	Details of all webparts deployed	NA
23	Details of all customization deploy	NA
24	Details of all webparts needed to be migrated?	NA
24	Details of all customization needed to be migrated	NA
25	Search related customization which are needed to be migrated?	NA
26	Details of design/Layouts which are needed to be migrated?	NA
27	Size of content which needs to be migrated?	NA
28	Any governance strategy in place?	No
29	Total number of site collections?	24 +/-
30	Total number of large site collections?	0
31	Total number of large list/ Document library?	NA
32	If any list/document has more than 60 versions?	No
33	Do you have migration tool or it should be part of proposal?	No migration needed/required
34	3 <sup>rd</sup> party integration if any?	None
35	Details of all the licenses used?	M365 G5
36	Types of site collections created?	NA
37	What authentication is used by SharePoint?	Active Directory

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38	Any compliance needed to be setup as part of migration?	None in place / recommended though
39	Details of customs forms and workflow created (specially if they are Nintex or K2)?	NA
40	Details of all workflows and forms in SharePoint?	None
41	If possible SPMT tool report (How to use SharePoint Migration Tool - Migrate to Microsoft 365   Microsoft Learn) ?	Not a requirement to migrate existing
42	What is the Budget?	Budgeted
43	Is the Court expecting a configuration-first solution in native SharePoint Online, or are SPFx/custom components acceptable where justified?	Accepted where justified
44	What specific cybersecurity / judicial branch / privacy standards should proposers map to?	RBAC
45	What role does Microsoft Entra ID play today, and what Active Directory dependencies remain?	Both being used
46	What is the current legacy intranet platform and approximate content volume?	SharePoint on-prem / not being migrated
47	Will the Court provide a content inventory and business owner map, or is discovery / inventory creation in vendor scope?	Discovery needed
48	What accessibility standard and testing evidence are expected?	Full
49	What repositories are in scope for migration besides the existing intranet?	MS Teams
50	Does the Court have an existing internal brand guide or accessibility standard beyond general government standards that the UI design must follow?	No
51	Does the Court prefer live virtual training, in-person sessions, or recorded modules for the "online resources for self-service support"	All
52	Does the Court have a target "Go-Live" date for the first phase of the modernized intranet?	No
53	Is there a preferred order of priority for the migration of specific departments or	No

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	functional modules (e.g., News and Announcements vs. Document Management)?	
54	Does the Court prefer live virtual training, in-person sessions, or recorded modules for the "online resources for self-service support	Train the trainer
55	How many key stakeholders or departments does the Court anticipate will be involved in the initial requirement-gathering phase?	6
56	Are there retention, labeling, DLP, audit logging, or eDiscovery requirements that the solution must align to?	None at this point but open to the option
57	Is there a preference for local vendors?	Yes
	What is the annual budget allocated for this RFP?	Yes
58	Work will be onsite or remote?	Remote
59	Are you open to a hybrid delivery model with a mix of offshore and onshore resources?	Yes
60	Who are previous incumbents on this project?	No
61	Who is the incumbent vendor currently providing similar services?	NA
62	Is the incumbent vendor allowed to participate in this RFP?	NA
63	What are the primary challenges or pain points the agency is currently experiencing with its existing systems, data processes, or reporting capabilities?	Outdated technology
64	Can you provide details on the existing intranet platform, including technology stack and current limitations?	Sharepoint on-prem circa 2010
65	Could you please confirm should the solution support integration with Microsoft	MS stack

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	Teams and Copilot, or any third-party tools?	
66	Is there a requirement for data cleansing, deduplication, or restructuring during migration?	No
67	What is the volume and type of content/data to be migrated (documents, media, archives)?	Some documents
68	Will the Court provide any existing documentation for the current intranet, such as site maps, content inventories, analytics, governance documentation, or architecture diagrams?	No
69	Does the Court have a preferred number of user stories, wireframes, or design review cycles expected as part of the engagement?	No
70	Can the Court clarify whether the listed features (news, document management, employee directory, org chart, calendar, search, permissions) represent the full required scope, or should vendors anticipate additional modules to be identified during discovery?	Anticipate additional modules
71	Can the Court clarify whether the proposed intranet is expected to function as a standalone SharePoint Online-based internal portal, or whether it should also integrate with and/or connect to the	standalone

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	Court's public-facing website or other external web properties?	
72	Does the Court expect the employee directory and organizational chart to be delivered using native Microsoft 365 / Entra ID capabilities?	Yes
73	Can the Court confirm the expected homepage widgets, personalization requirements, and whether audience targeting by role, department, or location is desired?	No
74	Approximately how much content is expected to be migrated (e.g., number of sites, pages, libraries, documents, file sizes, and total storage volume)?	No migration expectations
75	Does the Court expect all legacy content to be migrated, or should the selected vendor support content rationalization / archival and migrate only approved or active content?	Approved content only
76	Should the solution include approval workflows, publishing workflows, or content lifecycle automation, and if so, are Microsoft Power Automate / Power Platform components acceptable?	Not a requirement
77	Can the Court clarify whether "chat functionality or integration with existing chat tools (e.g., Teams, Copilot)" means simple links/embedded integrations, or	Not expected

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	whether deeper workflow and notification integrations are expected?	
78	Are there specific use cases for notifications and alerts (e.g., news publishing, document changes, policy acknowledgements, reminders), and are these expected to be standard or configurable by content owners?	configurable
79	Does the Court require only native Microsoft Search / SharePoint search capabilities, or should vendors propose enhanced search experiences such as custom search verticals, refiners, result types, and promoted content?	Enhanced search a requirement
80	Beyond Teams and potential Copilot integration, are there any other required integrations with Court systems (e.g., HR systems, document repositories, case-related resources, forms, calendars, or identity systems) that vendors should account for?	None
81	Is the Court expecting a single enterprise intranet site with department/section pages, or a broader hub-and-spoke intranet architecture with multiple sites and delegated content ownership across business units?	Single enterprise site
82	How many administrators, content authors, and end users are expected to	12 – virtual live, train the trainer

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	receive training, and does the Court prefer live sessions, recorded sessions, train-the-trainer, or a combination?	
83	Can the Court please confirm the Microsoft 365 and related licenses currently available for this project (e.g., SharePoint Online, Power Platform, Teams, Copilot, etc.), and whether proposers should rely solely on Court-owned licenses or include any required additional licensing costs in their pricing proposal?	Rely solely on M365 G5 licensing
84	What is the anticipated project go-live date?	ASAP
85	What are the expectations and timeline for ongoing support and maintenance after the system is implemented?	Optional
86	Do you expect the vendor to perform any tasks on-site, or can all work be performed remotely?	Remote only
87	Do you accept offshore resources?	Yes
88	What is the approved budget or range allocated for this project?  How would assessment of the current Intranet be conducted? (would in-person investigation be possible / preferred)?	Budgeted / remote assessment
89	Will design concepts / wireframes be required as part of the response to the RFP or would that be part of the project, when awarded?	The more information provided the better we'll be able to review and award
90	What relevant government standards, privacy policies, and cybersecurity protocols would need to be followed?	RBAC – security best practices
91	Will any guest users be accessing the Intranet? If so, will they need to be included in MS 365 groups?	No

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92	Is there any evaluation preference for California-based or locally present vendors?	Yes
93	Is the Small Business preference limited to California DGS-certified small businesses, or may out-of-state small businesses also qualify?	
94	Is there an estimated budget range or not-to-exceed value for this project?	Yes – discussed during contract negotiation
95	Does the Court have a preferred implementation timeline, such as phased milestones or a desired go-live date, that proposers should align with?	Phased and ASAP
96	Are there any project phases, including discovery or UAT, that would require onsite presence?	No
97	What types of Microsoft 365 licenses are currently in use?	M365 G5
98	What is the current number of intranet users, and what growth is anticipated over the life of the contract?	600 / minimal growth
99	What level and format of training is expected, such as administrator training, end-user training, train-the-trainer, virtual, or onsite?	Admin & Train the Trainer
100	Can the Court clarify the expected scope and duration of post-implementation support?	As needed but not a requirement
101	Are references from Federal and commercial clients acceptable?	Yes
102	<p>Budget Clarification</p> <p>1. Software solutions can vary widely depending on the project budget. Our firm has successfully delivered projects across various budget ranges. To help us best meet the goals of your solicitation, can you please approximate the anticipated budget range for this project? For example, is the anticipated budget range:</p> <ul style="list-style-type: none"> <li>• Less than \$50,000</li> <li>• \$50,000 – \$100,000</li> <li>• \$100,000 – \$150,000</li> <li>• \$150,000+</li> </ul>	Budgeted

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103	<p><b>Cost Structure Expectations</b></p> <ol style="list-style-type: none"> <li>1. With reference to 8.2 Cost Portion (Page 8 of RFP) , our understanding is that the Court is looking for a Fixed Cost proposal. Please confirm.</li> <li>2. Additionally, please confirm what this means - A “not to exceed” total for all work and expenses payable under the contract, if awarded (8.2, #c).</li> <li>3. Do we need to provide pricing till June 30, 2029, that also includes support component, or it should be only till post-go-live.             <ol style="list-style-type: none"> <li>a. Do the Court require any supporting pricing narrative, cost assumptions, or cost breakdown</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>1- Yes</li> <li>2- Turn key solution not to exceed</li> <li>3- Support post go-live should be a line item and not a requirement</li> </ol>
104	<p><b>Work Location/Offshore Delivery</b></p> <ol style="list-style-type: none"> <li>1. The RFP states that “Unless otherwise approved by Court in writing in advance, Work may not be performed outside of the United States”. Please confirm whether the Court would consider a delivery model that includes limited offshore resources, under Court oversight, and if we can propose such resources in our proposal who are employees of the Vendor in Offshore offices.</li> <li>2. Will background checks be required for offshore resources?</li> </ol>	<ol style="list-style-type: none"> <li>1 - Offshore is acceptable</li> <li>2 – awarded entity will be responsible to vetting resources and follow Court remote access policies</li> </ol>
105	<p><b>Project Duration and Implementation Timeline</b></p> <ol style="list-style-type: none"> <li>1. The RFP lists an anticipated contract start date of June 1, 2026, and a contract end date of June 30, 2029. Please confirm whether the Court anticipates a defined implementation period for the</li> </ol>	<p>Post support is optional and should be a line item in the bid</p>

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<p>106</p>	<p>Post-Implementation Support Expectations</p> <p>1. While the RFP references training and support (Page 2), it does not distinguish between one-time post-go-live support and ongoing support. Please clarify whether ongoing intranet support and administration are expected to be included in the proposal pricing, or if one-time post-go-live support and ongoing support is optional and may be proposed separately.</p> <p>2. Please confirm how many hours of support the Court is looking at for the Vendor to provide for the post-go-live support, and for how many days.</p> <p>3. Similarly, after post-go-live support is over, is the Court also looking for additional ongoing support till June 30, 2029. If yes, how many hours of support the Court is looking at each month.</p>	<p>1- Optional not a requirement 2- Provide tiers in bid 3- Vendor recommended and should have tiers</p>
<p>107</p>	<p>Acceptance of the Terms and Conditions</p> <p>The RFP evaluation criteria (Page 9) allocate 10 points for acceptance of Terms and Conditions. Page 7 states: "Note: A material exception to a Minimum Term will render a proposal non-responsive." However, Attachment 3 (page 32) allows proposers to submit exceptions via a redlined version and written rationale.</p> <p>Can the Court please clarify:</p> <p>1. What constitutes a "material exception to a Minimum Term" versus a non-material exception that may be discussed during contract negotiations?</p> <p>2. Is a proposer permitted to submit exceptions for discussion, provided they are not material to minimum terms, or does any exception risk rendering the proposal non-responsive?</p>	<p>1. Terms can be negotiated during contract negotiations.</p> <p>2. Yes</p>

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108	<p>Missing 'Appendix B' RFP mentions 'Appendix B' (Page 20, under section 2.3 Fees and Payment, and in some other places), but we couldn't find 'Appendix B' in RFP. Please let us know where we can get this.</p>	We will have into this.
109	<p>Submission Logistics / Proposal Due Date Extension From the date the Court releases responses to vendor questions, we respectfully request that the proposal submission deadline be extended to get a minimum of two working weeks. This additional time would allow us to thoroughly review the clarifications, incorporate any necessary adjustments, and ensure that our proposal is comprehensive, accurate, and aligned with the Court's expectations. We believe this extension will enable all vendors to submit their best possible solutions, ultimately benefiting the Court through more thoughtful and competitive proposals.</p>	OK
110	<p>B. Technical / Solution Oriented Questions Current Intranet Environment</p> <ol style="list-style-type: none"> <li>1. The RFP references migration from a legacy intranet system. Please confirm whether the current intranet is SharePoint-based or hosted on a different platform.</li> <li>2. If SharePoint based, which version.</li> <li>3. If different platform, which platform.</li> <li>4. Please provide a high-level inventory of existing content, sites, site collections, and document repositories as part of this Q&amp;A to come at an appropriate implementation timeline, and cost in the proposal response.</li> </ol>	<ol style="list-style-type: none"> <li>1. The current intranet is a web application hosted internally</li> <li>2. N/A</li> <li>3. Hosted on an IIS server</li> <li>4. Operations / Financial Business Process documents, HR Related documents, Employee Resources, Judicial Officer Pages, Reports</li> <li>5. If applicable, yes – JO page might be the only thing</li> </ol>

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	<p>5. Can we assume that each site collection will map to a corresponding Modern Team Site/M365 Group?</p>	
111	<p><b>Content Migration Scope</b> While migration is included in the scope, detailed volumes are not specified.</p> <ol style="list-style-type: none"> <li>Please clarify whether the Court expects full migration of all existing content and documents, or a selective migration approach based on business relevance and content freshness based upon discovery workshops.</li> <li>Please provide the data volume to be migrated (in GB/TB).</li> <li>Please provide approx. count of documents that need to be migrated.</li> <li>Will existing pages be replaced with modern pages?</li> <li>Our assumption is that internal Court staff will be responsible for the redevelopment of pages on the new SharePoint Online Intranet. Is that the correct assumption?</li> </ol>	<ol style="list-style-type: none"> <li>NO migration expectations / requirements</li> <li>We have files/forms we will manually migrate as identified and relevant to the appropriate site in SharePoint Online.</li> <li>Redevelopment will be part of the integration team/vendor – court staff will maintain what is developed post go-live.</li> </ol>
112	<p><b>Microsoft 365 Tenant Configuration</b> The RFP specifies use of the Court's existing Microsoft 365 G5 and SharePoint Online tenant. Please confirm whether the tenant is already fully configured with identity, licensing, and security policies, or if the selected vendor will be expected to assist with tenant-level configuration or governance setup.</p> <ol style="list-style-type: none"> <li>Is it only SharePoint Online Tenant Configuration &amp; Setup or any other workload also as part of M365?</li> </ol>	<p>Tenant already configured but receptive to vendor evaluating governance and recommending changes.</p>
113	<p><b>Integration with Microsoft Teams and Copilot</b> The functional requirements reference chat functionality or integration with tools such as Microsoft Teams and Copilot (Page 3, under 'Communications Tool') What functionality the Court want in the Chatbot, is it related to how to use the SharePoint Intranet, or other Court related</p>	<p>Chatbot would be specific to Intranet, if used. Teams and CoPilot integration is optional, thus nice to have.</p>

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	<p>topics. Please clarify the requirements of the Chatbot.</p> <p>Please also clarify whether Teams and Copilot integration is mandatory or optional, and whether Copilot licensing is already active within the Court's Microsoft 365 environment.</p>	
114	<p><b>Search Requirements</b></p> <p>The RFP calls for powerful search across documents and internal resources. Please confirm whether SharePoint Online native search is considered sufficient, or if the Court is seeking advanced search capabilities such as custom filters, refiners, or scoped search experiences.</p>	Advanced Search features preferred
115	<p><b>Governance and Role-Based Access Control</b></p> <p>Governance and RBAC are included as part of security and compliance. Please clarify whether the Court has an existing intranet governance model and permission taxonomy, or if the selected vendor is expected to define and recommend governance and access-control frameworks.</p>	Vendor expected to evaluate what is in place and make recommendations.
116	<p><b>Deployment Strategy</b></p> <p>The RFP references phased implementation to minimize disruption. Please confirm whether the Court has a preferred deployment approach (pilot groups, department-by-department rollout, or enterprise-wide launch), or if proposers should recommend an approach.</p>	Proposers should recommend – since we're not migrating on-prem, it can be an enterprise wide launch.
117	<p><b>Training</b></p> <ol style="list-style-type: none"> <li>1. RFP requires training for administrators. How many admins need to be trained.</li> <li>2. Does any training need to be provided to Site Owners, and End Users?</li> <li>3. Please confirm counts for site owners and End Users that need to be trained, and preferred modes (live remote, onsite, recorded sessions).</li> </ol>	Yes, Train the trainer / site owners / remotely.

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	4. We recommend Train the trainer (TTT) approach for end user training where we will train your Trainers/champions and they will train the end users? We will provide support to the trainers whenever required? Is that approach acceptable?	
118	Is there a defined escalation path from the Court, if business and IT stakeholders disagree during implementation?	Yes - CIO
119	Are there any fixed dates, events, or public deadlines that could constrain delivery?	NO
120	Are there any known lessons learned or considerations from prior similar initiatives that the Court would like vendors to account for in their approach?	NO
121	How tolerant is the Court to formal change orders if new requirements emerge post-kickoff?	It'll be a discussion point.
122	Should enhancements discovered during implementation be deferred, change-controlled, or absorbed?	Case by case basis - discussed
123	Is creating any workflows or process automation part of the scope? If yes, please provide the required details.	No
124	Who is the executive sponsor vs. day-to-day product owner for the intranet?	CIO / IT
125	Will the Court assign a dedicated business stakeholder group for requirements validation and UAT?	Yes
126	What is the expected turnaround time for approvals (design, content, UAT)?	ASAP
127	Is there a formal change control process, or should the vendor define one?	Vendor defined
128	Are there blackout periods (e.g., court operations, fiscal year-end) that could impact delivery?	No
129	How will user satisfaction be measured (survey, adoption metrics, analytics)?	Survey
130	Are there baseline metrics today (usage, search success rate, page visits)?	No
131	Is there an existing content inventory or taxonomy?	No

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132	Who will be responsible for content cleanup, validation, and ownership assignment?	Collaborative between vendor and IT
133	Are there content retention or archival rules that should be applied during migration?	No
134	Will departments be required to standardize naming conventions and metadata?	Yes
135	Are there file types or content that should NOT be migrated?	No
136	Should migration include: Version history? Permissions? Metadata recreation?	No
137	Who is responsible for content validation post-migration?	Content Owners / IT
138	Is a pilot migration expected before full rollout?	Yes
139	Are there branding guidelines, color palettes, or accessibility standards (WCAG) to follow?	No
140	Are there examples of intranets the Court likes/dislikes?	No
141	What level of customization vs. out-of-the-box SharePoint is preferred?	Customization expected but not required
142	Should governance include: Site provisioning process? Naming conventions? Lifecycle management (archive/delete)?	YES
143	What level of restriction is desired for Teams/Site creation (currently open)?	Should be limited to specific role w/in IT
144	Who will act as: Site Owners Content Authors Governance Committee	TBD
145	Are there expectations for automated governance (policies, provisioning workflows)?	No
146	Are there data classification requirements (public, internal, confidential)?	No
147	Should Microsoft Purview be implemented in Phase 1 or roadmap only?	Ideally

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148	Are there requirements for: Conditional access policies? Sensitivity labels? Audit logging/reporting?	Yes
149	Should search include: People directory integration? Metadata-driven filtering?	Yes
150	Are there expectations for custom search experiences (PnP, verticals, etc.)?	Yes
151	Who will maintain search schema and refiners post-go-live?	IT
152	Of the following, which should be included vs. optional: Employee directory (with org chart) Event/calendar system Forms digitization (Power Apps) Workflow automation (Power Automate) Teams integration	1- Employee included 2- Event – optional 3- Power Apps – optional 4- Workflow - optional
153	Is there interest in Copilot integration for search/content?	Yes
154	What is the expected support model post go-live? Hypercare (30–60 days)? Ongoing managed services?	Should be line items on the bid response - optional
155	Are SLAs required for: Issue resolution? Enhancements?	Ideally, yes
156	Will the Court require a knowledge transfer plan to internal IT?	YES
157	Is the 3–6 month timeline fixed or flexible based on scope refinement?	Flexible
157	What is the target go-live date?	ASAP
158	What is the approximate current intranet inventory: number of sites, number of pages/news posts, number of documents/libraries/lists, and total size (GB)?	No migration requirements / expectations
159	Who decides what content moves to SharePoint Online (Court selection vs vendor-led inventory + recommendations + Court approval), and when will the final in-scope content set be confirmed?	IT—during discovery phase
160	Should the target structure be a hub/landing site plus approximately 12	Hub w/ 12 sites

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	associated divisional/department sites, or does the Court prefer a different information architecture?	
161	When you say “templates they can adopt,” what deliverables are expected (site templates, page templates, navigation/IA patterns, branding/theme standards, and/or content standards)?	Preferably, all of the above
162	Should proposals assume configuration-first using out-of-the-box SharePoint capabilities unless explicitly required, or are custom/SPFx web parts expected in the base scope?	I’m not looking for a basic SharePoint site, so assumption that custom web parts will/should be used.
163	Is out-of-the-box SharePoint/Microsoft Search sufficient, or do you expect custom search configuration (managed properties, refiners/verticals, promoted results) in the base scope?	Enhanced web search is a requirement
164	What employee directory and org chart functionality is required, and what is the system of record for profile data (M365 profiles only or another source)?	System of record is Active Directory
165	Do you want Dev/QA/Prod implemented as separate site collections within the existing tenant, separate tenants, or another Court-preferred approach—and will the Court provide baseline environments or should the vendor provision/configure them?	Separate site collections w/in existing tenant and vendor should help provision.
166	Do you want governance and retention delivered as recommendations only, or should the vendor implement/configure governance controls and retention policies within M365 as part of the base scope?	These should be discussion points, with end result being vendor implements them w/in the scope of the project.
167	What training/adoption approach do you prefer (live remote sessions, recorded modules, train-the-trainer, or a combination), and approximately how many admins and content owners/authors should be trained?	Remote – train the trainer .. with a dozen admins / site owners trained

Please note the bid due date remains the same.

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**FINANCE / GENERAL SERVICES DIVISION**

We appreciate your participation in the solicitation process and thank you for your interest in doing business with the Court.

Sincerely,

**Collin Conroy**

Collin Conroy  
Procurement

cc: Ev Plascencia  
Sabrina Hsu