



NATIONAL
QUALITY FORUM

Migration to SharePoint 2016

REQUEST FOR PROPOSAL

April 24, 2017

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INTRODUCTION

Since 2011 NQF has relied upon SharePoint 2010 to manage internal content and serve as a collaboration space for external users. As part of its strategic plan, NQF is focused on improving its ability to accurately and quickly obtain feedback used by the federal government, healthcare organizations, and other stakeholders in the healthcare community as well as becoming an innovator in areas of healthcare measurement that have gaps in research and recommendations. The move to a newer SharePoint platform is essential to continuing to provide these essential services to the aforementioned stakeholders.

Incorporated in 1999, the National Quality Forum (NQF) is a not-for-profit membership organization created to develop and implement a national strategy for healthcare quality measurement and reporting. A shared sense of urgency about the impact of health care quality on patient outcomes, workforce productivity, and healthcare costs prompted leaders in the public and private sectors to create NQF as a mechanism to bring about national change.

Established as a public-private partnership, NQF has broad participation from all parts of the health care system, including national, state, and local groups representing consumers, public and private purchasers, employers, health care professionals, provider organizations, health plans, accrediting bodies, labor unions, supporting industries, and organizations involved in health research or quality improvement. Together, NQF and its member organizations work to promote a common approach to measuring healthcare quality and fostering system-wide capacity for quality improvement.

NQF is headquartered in Washington, D.C. and has approximately 100 staff and 430 organizational members throughout the United States and occasionally abroad. NQF's revenue is approximately \$23,000,000 annually.

The anticipated time frame for vendor selection is June 2017.

BACKGROUND

NQF maintains two web applications:

- staff.qualityforum.org: Intranet consisting of 245+ subsites, synchronized with NQF's Active Directory.
 - share.qualityforum.org is a mirror of this internal site with unique permissions to allow sharing content with external users. This site uses a single sign-on (SSO) authentication manager to connect with iMIS, our association management platform.
- public.qualityforum.org: An infrequently used platform for document storage that is open to the public without user authentication that contains only five subsites. Also serves as landing page for signing out of



- publicstaff.qualityforum.org is a duplicate of this external site, which directly links to NQF's Active Directory, but it is not currently used for any unique purposes.

These systems support approximately 15,000 unique page views per month and 14,000 unique visitors over the course of the year. The site collections together hold approximately 80GB.

Out of the box solutions are used for the creation and maintenance of the sites. However, there are a few external solutions currently utilized:

- Nintex Workflow Management
- InfoPath forms
- Virtosoftware
- SpealsSurvey.

NQF also has a custom web part created to manage one subsite.

The SharePoint environment is currently hosted by ClearPath Solutions with three servers in the environment which is accessible by NQF staff through a point-to-point VPN.

1. Domain Controller. This server provides active directory services even if the P2PVPN is not functioning. It also provides SLDAP services to other NQF service providers.
2. SQL Server. This is a Microsoft SQL Server 2008 server with 4 CPUs and 16GB of RAM. It only provides services to SharePoint.
3. SharePoint Server. This server contains the SharePoint 2010 instance. It has 2 CPUs and 12GB of RAM.

SharePoint environment is currently using both forms based authentication and Active Directory Authentication.

- Forms based authentication is provided via a custom SSO solution that is both token and cookie based. The custom .NET authenticator validates username and password credentials against our association management software (iMIS). This authentication mechanism is used by 500-1000 users annually to access extranet content.
- Active directory authentication is provided to allow NQF staff access to the entire site.

Project Overview and Objectives

Overview

The qualified vendor shall provide services to architect, design and implement SharePoint 2016 as a platform building off the existing SharePoint 2010 infrastructure, which is used both as an intranet for NQF staff and a collaboration point for external users. The successful solution will introduce an internal site structure based on industry best practices utilizing out-of-box (OOB) features to align sites with current NQF branding.

Requirements

The vendor will be responsible for the following:

- Detailed analysis of the current environment.
- Project plan for migration, testing, and implementation of SharePoint 2016 with minimal end user impact.
- Migration to SharePoint 2016
- Post migration support services.

Additionally, NQF would like to consider:

- Designing a customized home page that aligns with the current visual brand of NQF
- Recommending additional solutions not currently in use that would improve end user experience

Development Approach

NQF is open to a variety of solutions to meet the needs of the end users. The flexibility of SharePoint 2016 allows for a variety of approaches to architecting the site collections and ensuring content currently on the SharePoint 2010 environment if moved to the new SharePoint 2016 environment. Please note, however, while NQF's current infrastructure is largely built off Microsoft technologies, there are no current plans to transition other parts of the infrastructure to Office 365.

Deliverables

- Detailed analysis of the current environment. Analysis addressing NQF needs and the methods to be implemented to address each identified business need.
 - Site template using OOB features to closely mirror current NQF branding standards
- Project plan for migration, testing, and implementation of SharePoint 2016 with minimal end user impact. These could include:
 - Detailed implementation or staged migration plan
 - Testing plan



- Physical and logical architecture design
- Governance and security plan
- Secondary systems integration plan (e.g. iMIS data exchange)
- A fully functional SharePoint 2016 platform with all agreed upon data and functionality included.
- Post migration support services.

Desired Time Frame

The anticipated contract period is June 15, 2017 – December 15, 2017.

Services Requirements

NQF desires a vendor that can provide a comprehensive range of services related to technology evaluation, information architecture, content creation, and web design on SharePoint 2016 and related technologies.

Costs

Time and Materials Rates

All activity will be billed on a Time and Materials basis. With prior approval from NQF, the vendor may be asked to incur other direct costs on behalf of NQF (e.g. Nintex licensing) that will be reimbursed upon proper invoicing.

Time and Materials Invoicing

The vendor will provide bi-weekly invoicing summarized by type of activity based on the categories defined in the initial work plan (examples may include: requirements gathering, development, testing, etc.), number of staff hours involved and at what rate(s).

Proposal Preparation Instructions

Deadline for Submission of Proposals

All proposals are due to NQF by noon, Friday, June 2nd 2017

Send all bids electronically to:

Jason Johnson
National Quality Forum
1030 15th Street NW
Suite 800
Washington, D.C. 20005



jjohnson@qualityforum.org

Questions and Answers

All questions and requests for clarification or interpretation of the RFP must be submitted in writing via email and addressed to the following individual:

Jennifer Ramsey
National Quality Forum
1030 15th Street NW
Suite 800
Washington, D.C. 20005
jramsey@qualityforum.org

NQF will respond to all inquiries via email and will make a good faith attempt to respond within three business days of receiving a question. NQF reserves the right to share any information given as a result of a response or clarification with all other vendors responding to the RFP. The organization requesting the response or clarification will not be identified. Inquiries must be received by noon *Tuesday, May 30th, 2017*.

Reservation of Rights; Cost of Proposal Preparation

This Request for Proposal does not commit NQF to award a contract. NQF reserves the right to waive or modify any particular requirement(s) in this RFP, with or without notice and with or without cause, to accept any proposals, and to reject any and all proposals and to call for new proposals. Each vendor is responsible for its own costs in connection with responding to this RFP.

Vendor Evaluation Criteria

Vendor proposals will be evaluated by a committee of reviewers, including individuals with a background in web development, SharePoint administration, and project implementation.

Proposals will be scored by assigning a maximum of 100 points across five criteria:

1. Understanding of project purpose (5 points)
2. Understanding of NQF (5 points)
3. Vendor expertise and capabilities (25 points)
4. Approach (45 points)
5. Rates and justification (20 points)

More detailed elements of each criterion can be found below. All vendor responses will be treated as confidential information and will be used solely for the purposes of selecting a vendor to perform the work described.



Understanding of Project Purpose (5 points)

The extent to which the proposal demonstrates clear understanding of the project requirements, background, and goals.

Understanding of NQF (5 points)

The extent to which the proposal demonstrates clear understanding of the National Quality Forum's role in the larger healthcare quality arena, and how the proposal fits into NQF's strategic objectives.

Vendor Expertise and Capabilities (25 points)

A description of the vendor's organization, including number of years in business, annual revenue, and number of similar implementations. Indicate the amount of experience you have working with associations.

A list of key personnel and their resumes.

The contact information of two existing customers whose requirements closely resemble those of NQF.

Proposed Approach, Work plan, and Activities (45 points)

A description and explanation of the vendor's engagement strategy specifically addressing the Requirements section of this RFP. A proposed schedule and methodology for transitioning from the current SharePoint 2010 platform to the new SharePoint 2016 environment.

Rate and Justification (20 points)

Recommended labor categories and approximate costs.

Recommended architecture approach and approximate costs.

Vendor Evaluation Process

The evaluation and acquisition will be done in two phases.

The first phase includes the distribution of this Request for Proposal (RFP) and the evaluation of responses. The vendor responses will be evaluated to determine which proposed solution offered provides the closest match to NQF's requirements.

NQF will identify several finalists to participate in the second phase. As determined by NQF staff, the finalists may then be invited to present their proposed approach at the NQF offices. These presentations will provide the organization with the opportunity to validate the vendors' capabilities and evaluate factors which include, but are not limited to implementation strategy,



depth of expertise in the not-for-profit space, flexibility, project management process, follow on support approach, and the overall quality of the vendor's offering.

Upon the completion of the demonstrations and such further evaluation as NQF deems necessary, NQF may determine, in its sole discretion, not to select a vendor and to initiate another search at a future date.