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*In the order presented:*

1. Is there currently an incumbent vendor or a vendor Texas RE currently works with?
  - a. Texas RE terminated its agreement with the vendor who implemented our public web site and has started the process of Intranet/Document Management discussion. Texas RE expects this RFP to provide us options before Texas RE engages in such a large venture. Texas RE does not have an intranet or extranet in place. Texas RE has invited and encouraged any relevant vendor it has worked with in the past or earlier bidders for previous RFP's to respond.
2. What is the budget for this initiative excluding hardware and licensing fees?
  - a. This is a budgeted project and the expectation is that the costs will total from \$75K to \$300K excluding hardware and licensing.
3. Do you expect the out of the box features of SP2010 to meet all the requirements in the RFP?
  - a. No. Texas RE expects varied levels of developments. Texas RE expects that SharePoint 2010 is a flexible enough platform to accommodate the various requirements stated in the RFP. Texas RE is also open to 3<sup>rd</sup> party software if a cost benefit can be realized. Ultimately, Texas RE would prefer zero-development application but understands that not every requirement will have an out of the box solution.
4. Is a fixed bid required or will a T&M be fine?
  - a. Either price approach is acceptable. All requirements must be met no matter what approach is taken. This will be clearly defined in the Final Statement of Work. In the case of T&M proposals, blended rates are preferred to reduce the project accounting burden. However, if the bidder determines a multiple resource rate approach is more competitive, then it should be clearly described in the proposal.
5. How many users will use the system?
  - a. Intranet: ~65 (40 concurrent).
  - b. Extranet: ~50 (25 concurrent).
  - c. Internet: General Public
6. Can any work be performed off-site?
  - a. Each phase requires a particular level of face to face interviews. This is dependent on the vendor's approach.
  - b. Texas RE does not expect to pay expenses related to T&E as part of this project. All costs should be baked into the rate(s).
7. What percentage of team must be onsite?
  - a. See previous answer;
    - i. Please consider the use of Microsoft MSF phase recommendations. Texas RE considers the MSF model a reasonable delivery framework.
8. Are there any team members that must be full time onsite?
  - a. See previous answer.
9. Where will the solution be physically hosted?
  - a. On Texas RE premises. Texas RE expects to setup any required infrastructure.

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10. How does Texas RE differentiate between extranet and internet functionality? Internet users are anonymous.
- The Internet facing website will be a traditional content storage and presentation service. There most likely will be calendars, banners, news and forums.
    - These users will be anonymous. Texas RE hasn't decided if it should use membership features.
  - The extranet will provide a feature rich environment for document collaboration, forums, collaboration, etc...
11. Are these separate infrastructures or same?
- Texas RE expects these to be separate farms at a minimum. The physical infrastructure may be shared or virtualized.
12. Are there requirements for keeping the information separate between internet, intranet, and extranet?
- Some workflows will move information or actions from one environment to another. This includes content publishing.
13. Are these separate infrastructures?
- See answer 11.
14. Under PSA 5.3, reference is made to compliance with software security and other documents, can you provide those?
- These will be provided to the winning vendor. Texas RE expects the delivered system to be secured relative to the risk involved in the various environments (Intranet, Extranet, Internet zones). Texas RE expects the vendor to have verifiable experience in deploying these types of solutions.
15. 99.99% uptime is a requirement. Is that planned up-time or total up-time?
- Planned uptime.
16. Does Texas RE require/desire a disaster recovery plan? Disaster recovery/failover site?
- Texas RE will meet any requirements for highly available infrastructure including a geographically diverse site.
17. How many approvers will exist for the document deliverables and how many review cycles are typical before approval?
- It is expected that Texas RE will have no more than three approvers per deliverable. Texas RE expects to make this approval in committee to reduce the turn-around time.
18. Has Texas RE procured licenses for software?
- Texas RE will provide any required software licenses.
19. Will Texas RE procure the infrastructure or does Texas RE require the vendor provide the installation and implementation of the infrastructure?
- Texas RE will provide the necessary infrastructure.
20. Microsoft provides comprehensive online help and documentation for the functionality of SharePoint. What additional end-user documentation does Texas RE specifically require?
- Texas RE expects an appropriate level of end user training for basic end users, developers, infrastructure management, and content administration. The proposal should include these as options to the bid.

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21. Texas RE makes reference to development, test and production environments, are there other environments that are desired?
- Texas RE expects to have two environments, TEST/DEV and PRODUCTION.
22. What types of prototypes does Texas RE require?
- Low, High level/fidelity, and functional prototypes per environment.
23. How many wire-frames comps does Texas RE require?
- See previous answer.
24. Does Texas RE require wire-frames for all pages to be built?
- No, only for primary department pages (~5-8) and home pages. One per service.
25. Does Texas RE require heavily branded site or near out of the box look and feel for SharePoint? A moderate level of branding will be required.
- Texas RE has sample images and color schemes already defined.
26. How many people will need to receive technical training?
- 4 Technical training, ~6 Super User, ~40 End User.
27. Vendor services are envisioned to end on Feb 28, 2012, is there a go-live goal before that?
- This should be determined by general planning estimates for similar, related, past projects. Texas RE would like to deploy the new Internet site prior to January 1<sup>st</sup> 2012.
28. Can you provide a copy of ethics agreement?
- Yes. It will be posted online. [Texas RE Procurement Page](#).
29. How many users will be supporting content authoring on the web sites?
- Intranet: ~40
  - Extranet: ~10
  - Internet: ~10
30. What is the breakdown of that team in terms of roles and responsibilities?
- Intranet: Unknown.
    - The development of a governance model needs to be included as part of the scope.
  - Extranet: Unknown.
    - The development of a governance model needs to be included as part of the scope.
  - Internet: Unknown.
    - The development of a governance model needs to be included as part of the scope.
31. What technologies are supporting the current web sites?
- Intranet: Does not exist.
  - Extranet: Does not exist.
  - Internet: SharePoint 2010 and SQL Server 2008R2, C# and other .NET code.

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32. What software is currently being licensed to support web publishing?
- a. Intranet: None
  - b. Extranet: None
  - c. Internet: SharePoint Designer 2007
33. How many Texas RE departments will be provided their own web page / section on the new web site?
- a. Intranet: 5-8
  - b. Extranet: 2-3
  - c. Internet: 8
34. How many documents will be either migrated or made available within your web sites (count)?
- a. Intranet: Up to 200K (files)
  - b. Extranet: Up to 1K (files)
  - c. Internet: Up to 500 (files)
35. Where are these documents located today?
- a. Intranet: File shares.
  - b. Extranet: File Shares.
  - c. Internet: Current Site, Email.
36. Does Texas RE expect the project to facilitate a content review process and/or new content development during the course of the project?
- a. Intranet: Yes.
  - b. Extranet: Yes.
  - c. Internet: Yes.
37. Briefly describe the current process for publishing content to your web sites including any approval or internal processes that support the web publication process.
- a. Intranet: Does not exist.
  - b. Extranet: Does not exist.
  - c. Internet: Informal, 3-step.
38. How are Texas RE employees authenticated for permissions to publish content to the web? For example, does the current infrastructure use Active Directory or similar authentication service?
- a. Intranet: Does not exist.
  - b. Extranet: Does not exist.
  - c. Internet: 10, using Active Directory.
39. Does Texas RE wish to publish information to the web from back-end information systems? If so, what systems or applications would the solution need to integrate with?
- a. Intranet: Yes. RSS, SOAP, XML and SFTP/FTS based services.
  - b. Extranet: Same.
  - c. Internet: Same.
40. What type content would need to be surfaced to the web site?
- a. Intranet: Most Major content types (DOCX, XLSX, PPTX, PDFX, ZIPX).
  - b. Extranet: Same.
  - c. Internet: Same.

41. Does Texas RE have a standard set of vocabulary terms (taxonomy) used to describe content that is published to the web? Described another way, does the current web publishing process / software allow the content author to add Metadata to the content being published?
- Intranet: Yes. Metadata is not currently captured, but taxonomy is accessible via storage structures and file names.
  - Extranet: Same.
  - Internet: Same.
42. How does Texas RE reuse content throughout the websites today?
- Intranet: Office Templates.
  - Extranet: Same.
  - Internet: Same.
43. Do you foresee that current SharePoint 2010 functionality will meet your records management requirements or do you believe your requirements are more complex and will require custom (.Net) development to meet your records management requirements?
- Intranet: Texas RE is unfamiliar with the complete capability of SP2010. A session will most likely be required to translate our retention requirements into technical requirements.
  - Extranet: Same.
  - Internet: Same.
44. Are there any legal or regulatory constraints for using either offshore or non-US Citizen resources on this project?
- Intranet: Not currently, although some discovery would be required on the part of Texas RE to reach a final determination.
  - Extranet: Same.
  - Internet: Same.
45. Which browser platforms must be supported for your intranet/extranet/internet solutions?
- Intranet: IE8+
  - Extranet: IE8+
  - Internet: IE7+, Firefox 3+, Chrome Current.
46. On a scale from 1 to 5, how would you rank your knowledge around the SharePoint 2010 platform? You may use half points if necessary (such as 3.5).
- Users: .5** = Texas RE has zero SharePoint 2010 knowledge, our experience is only around SharePoint 2007.
  - ITSEC Staff: 2.5** = Texas RE has seen some basic functional demonstrations of the new SharePoint 2010 features.
47. Do you have any information / documentation that you can share around your vision or functional requirements for the extranet solution?
- Extranet: The functional requirements have not been developed, but it would be very similar to Intranet specifications.
48. Is the intention for the extranet to replace the existing Texas RE customer facing portal?
- Extranet: No. It is to augment the Intranet and future Texas RE Portal as an independent collaboration platform.

49. Do you have a count of the number of sites/pages that will make up the extranet solution?
- Extranet: Texas RE expects about Three sites (Board of Directors, NERC, and FERC).
50. The Request for Proposal (RFP) provides for a mandatory scope item to “Enable Mobile Access”. Are you looking to create a mobile enabled variation of your extranet or are there specific functions that must be developed as a mobile enable solution? If there are specific mobile functions in scope, what are those functions that must take place via a mobile solution?
- Extranet: Texas RE expects the mobile version of the Extranet will be primarily an approval mechanism and possibly will only provide viewing of general content.
51. Which mobile platforms are in scope for the extranet Mobile Access component?
- Extranet: WinMo, iPhone, Android (browsers only), not Applications.
52. Do you foresee that standard SharePoint workflows will facilitate your workflow requirements or do you foresee the need for more complex custom developed (.Net) workflows to meet your needs?
- Extranet: Unknown.
53. Do you have any information / documentation that you can share around your vision or functional requirements for the internet solution?
- Internet: Primarily to restructure the current information architecture and add forums with process and voting capability (I.e. Proposal, Review, Comment, Vote, Restart, or Approve, etc...).
54. How many languages will the future site need to support (English, Spanish, etc.)? Consider both near term and long term.
- Internet: English Only.
55. In a percentage, how much of the content within <http://www.texasre.org> will be migrated to the new SharePoint 2010 internet site?
- Internet: ~75%
56. How does the Texas RE currently measure web traffic? For example, do you leverage a web analytics solution like WebTrends?
- Internet: Texas RE isn't performing this kind of analysis yet. Recommendations would be welcome as part of the Implementation strategy.
57. Will you require Search Engine Optimization resources/consulting to maintain current search rankings on your internet solution?
- Internet: Texas RE has not decided this yet and is open to recommendation.
58. The RFP provides for a mandatory scope item to “Enable Mobile Access”. Are you looking to create a mobile enabled variation of your external web site or are there specific functions that must be developed as a mobile enable solution? If there are specific mobile functions in scope, what are those functions that must take place via a mobile solution?
- Internet: Primarily view and access documents.

59. Which mobile platforms are in scope for the internet Mobile Access component?  
a. Internet: WinMo, iPhone, Android (Browsers only, not application).
60. Are any business considerations driving the timeline expectations for the project?  
a. Texas RE is working to get ahead of current NERC and FERC initiatives.
61. Does Texas RE have any preferences on how they like to distribute web site training (Vendor Facilitated Training for all Content Authors; Train-the-trainer)?  
a. A mix of these techniques may be required. Train-the-trainer would be preferred for End User Training, while Instructor/Mentor-led training would be required for technical subjects.
62. How do you people learn best? (Hands on Training; Training Documentation; Training Videos; etc.)  
a. It's a mix, however, hands on training seems to work best in many cases. Traditional manuals are also useful. Web recordings have not been used in the past, but Texas RE expects to pilot this technique as an additional learning medium.
63. What percentage of time is Texas RE able to allocate the following resources to the project?  
a. Project Manager  
b. SharePoint Administrator (Site Collection)  
c. SharePoint Developer - A SharePoint Developer is someone who extends SharePoint through the use of custom configurations or compiled code using Visual Studio and C# and deploying that code as a SharePoint feature using a solution package.  
d. SharePoint Designer - A SharePoint Site Designer is someone who knows how to manipulate the site brand (look and feel) for SharePoint typically accomplished through the use of markup language and SharePoint Designer.
64. What are the internal/external risks that should be accounted for during our response to the RFP? (Example: Limited access to subject matter experts during the Envisioning/Planning Phases).  
a. Limited access to subject matter experts during the Envisioning/Planning Phases.
65. Will all Texas RE resources be co-located during this project? If not, do you have a travel budget to bring together resources at critical times during the project (Requirements Session, Validation/Testing, Training, etc...)?  
a. All Texas RE resources will be available locally.
66. Should Catapult bid a travel budget to reach critical project resources during the project lifecycle?  
a. IT is preferred that vendor provided resources are local.  
i. Travel costs should be "baked" into all hourly rates where it makes sense and is competitive.
67. Where will the SharePoint servers be located?  
a. On Texas RE premises

68. Will the awardee be granted Administrator (server) level access to the SharePoint servers during the project?
- On Texas RE premises

**Maintenance and Support Questions**

69. What are the standard business hours that Texas RE requires support? For example, 8 to 5 CST, Monday through Friday.
- 7:30AM to 5:30PM
70. What are the required service levels and definitions, ex: Sev1 = 1 hour response time, Sev2 = 2 hour response time, etc.
- Texas RE currently enlists 24x7x65 and Same Day (1-hour and 4-hour response) models for various software and infrastructure services.
71. Is resolution time a required service level? For example, after reporting a problem with the site, problem must be fixed within 1 hour.
- This is not currently defined.
72. What is the recovery time objective for restoring deleted site content? For example, 1 business day
- One business day
73. What is the existing uptime for the site? Please use an average based on the past 12 months, ex: 99.95%, not counting planned downtime for scheduled maintenance.
- The current website has a 99.9 planned uptime.
74. How is uptime currently calculated? For example, an off-site monitoring service from SiteUpTime.com or AlertSite.com
- Manually by calculating downtime to uptime ratios.
75. What are the service credits for missing a service level? For example, 1% credit towards monthly service fee.
- Not currently used in Support agreements
76. What are the preferred contact methods for reaching our support organization, ex: Phone, Email, web based ticketing system?
- Phone and Email
77. Does our support organization need to programmatically interface with Texas RE's existing helpdesk system?
- No
78. What is the system of record for tracking our support organization's responsiveness and resolution time? Is it Texas RE's ticketing system or our tracking system?
- It's currently captured in email; however Texas RE is planning to implement a ticketing system in the near future.
79. What are the reporting requirements for our support organization to provide Texas RE for our service levels?
- Not currently defined
80. How many meetings per month would our support organization be required to attend including change management, and general program management meetings?
- As required by the project schedule.

81. What is the estimated number of hours per month needed to support page level administration and content management? Please use an average based on the past 12 months of requests.
- Unknown.
82. What is the estimated number of hours to support advanced customizations and code changes to the site? Please use an average based on the past 12 months of requests.
- Unknown.
83. What are the assumptions for who is providing Tier 1 / Level 1 support for Texas RE Employees and the Public? For example, would the Texas RE Web Master filter requests before escalating to our support organization?
- Texas RE expects to provide this service via email and phone contacts.
84. Does Texas RE assume that our support organization is remote or on site?
- Remote
85. Describe the current Texas Reliability Entity environment that these systems described in the RFP will replace?
- Intranet: Replacing file shares
  - Extranet: Replacing file shares
  - Internet: Replacing a SharePoint 2007 site
86. Do you currently have SharePoint 2007 and use it?
- See question 85.
87. What are the problems and pain points with the current system Texas RE has in place?
- Search relativity and navigation.
88. Section 2.1 says “These services will improve Texas RE’s ability to perform its mission by enabling greater efficiencies, enhancing productivity, and providing tools for meeting Texas RE various internal and external requirements.” Could you elaborate more on the various internal and external requirements?
- There are inherent efficiencies to be gained by replacing much of our paper and/or email based processes with workflows that deal with inter\intra-department workloads.
89. How many staff will need to be trained?
- See question 26.
90. How many SharePoint administrators require training?
- See question 26.
91. How many users will require training?
- See question 26.
92. How many people from Texas RE will be giving input during requirements gathering and planning phase?
- Approximately 14 (~20% of the organization)
93. Do you have hardware in place to support the 2010 environment?
- Yes.
94. What are the expected numbers of internal and external users?
- See question 5
95. What is your long-range plan for management and support of these three environments?

- a. Unknown
96. Are multiple languages required?  
a. See question 54.
97. Is there current content that will need to be automatically or manually migrated to the new SharePoint 2010 environment?  
a. Yes. See question 111.
98. Other than wireframing is any user experience or branding effort required as part of this project?  
a. UX: Moderate  
b. Branding: Moderate, See question 117.
99. Can you describe or comment on your desired search experience? (E.g. people search, expertise search, etc.).  
a. The current search relativity is mediocre at best. (SP2007 based)
100. How important is search in your vision of your future business processes.  
a. Critical
101. Can the 09:00 delivery deadline be moved to the afternoon to allow for courier delivery schedules?  
a. Yes, but must be explicitly requested and granted.

## Questions from Bidders Conference

### Companies in Attendance

- Catapult Systems
  - Sungard
  - Alliance Technology
102. Is part of the scope updating to 2010?  
a. The scope should include re-architecting the existing website. The current public web site can be reviewed at external site, info is scattered, want to reorganize.
103. Should the proposal include hardware or software procurement?  
a. No.
104. What encryption schemes or security methodologies are expected?  
a. FIPS-1 and/or FIPS-2  
b. MD5, 3DES, SHA1 are acceptable
105. Will Texas RE self-sign certificates?  
a. Texas RE will use 3rd party (Internet based) signatures like VeriSign, Comodo, DigiCert, Thawte, etc...
106. What external interfaces are expected in the Extranet  
a. Connections to NERC's and FERC's services
  - i. SOAP/Web Service based
  - ii. XML standards
  - iii. Secure FTP (SFTP or FTPS)
107. Does Texas RE have defined Records Management policies?

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- a. Yes and those may be provided to the winning bidder. They are similar to ERCOT.
108. Is the current data structured
- a. Yes. It is currently in a well-defined structure, perhaps even over-structured.
  - b. Document metadata, tagging is expected.
  - c. Applications will be developed for use with this structure.
  - d. Current CMEP Program and Protocol Compliance requirements are published by NERC and the PUCT respectively.
109. What resources will Texas RE provide?
- a. Texas RE will provide all of its IT & Security staff as well as members of its Lines of Business/Functional Areas.
110. What document management functionalities/migration is required?
- a. Migration should be out of scope yet the vendor will assist in developing a migration methodology will be in scope
111. Should vendors provide a recommended support model
- a. Yes.
  - b. Texas RE envisions the respondent will provide a support recommendation based on known information.
  - c. Texas RE will have to determine if team can acquire skills needed.
  - d. Texas RE will need advisory services, maybe infrastructure monitoring.
  - e. The Business will take ownership of content management and permissions.
  - f. The proposal could include how to approach managing sites. Very few staff members currently have experience, so please include training in your proposal.
112. Does Texas RE need licensing recommendations?
- a. Yes. This should include all hardware and software procurement requirements
113. What type of mobile access is required?
- a. Ability to view a content on smartphones (I.e. Android, iPhone, WinMo)
  - b. Ability to respondent to approval requests via phone.
114. What sort of content creation will be required?
- a. Some new material will be required for the Internet site
  - b. Texas RE already has defined logos and color schemes
115. What parties are expected to access the Extranet at Go-Live?
- a. FERC, NERC, Texas RE Board of Directors, ERCOT
116. Does Texas RE already have templates for deliverables?
- a. Texas RE only has basic style templates. The vendor would need to provide any deliverable-specific templates.
117. What is the expectation regarding the methodology.
- a. Texas RE expects a mid-level narrative. Texas RE will not strictly judge the limit on the methodology length. It is important that vendors provide

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- adequate detail so Texas RE can properly review and evaluate the proposal properly.
118. What is driving the delivery date?  
a. Texas RE's budget cycle.
119. Can subcontractors be used?  
a. Yes. Joint proposals are also permitted.  
b. All subcontractor relationships must be disclosed.
120. Are offshore resources permitted  
a. Texas RE would like to see offshore resources as an option and not a sole approach  
i. A rough order of magnitude can be described one way or the other in the form of a percentage increase or decrease relative to the respondent's recommended approach.  
ii. Foreign access to systems will need to be evaluated on a case-by-case basis.  
iii. Export compliance could come into play regarding encryption security requirements and could be a limiting factor.
121. Who will buy any required graphics?  
a. As with hardware and software, Texas RE will purchase any stock photos/graphics required for the project.