

1. Of the approximately 80 SharePoint sites currently in use, how many are considered active, inactive, or candidates for archival? **95% are currently in use. The vendor will need to assess if they all need to stay active moving forward or if there is a way to reduce the number moving forward.**
2. Approximately how many documents and files are stored across SharePoint and OneDrive? **We are unable to pull this information at this time.**
3. Are there specific departments, business units, or SharePoint sites that should be prioritized during the assessment and implementation? **No. We are open to piloting and/or starting with a specific work area but do not have a priority order for this effort.**
4. What are the primary challenges users experience today when locating documents, records, or information? **There is no standardized way in which critical documents such as budgets, grants reports, agreements, presentations, etc. are stored across divisions. From a continuity of operations standpoint, not sure senior leadership could find critical files and information in a pinch especially for other Divisions within the organization. There is duplication of storage across sites as well causing a strain on storage space.**
5. What standards currently exist for site creation, naming conventions, site ownership, permissions management, document organization, metadata, or records management? **Standards may exist for naming/organization/records management in some work areas, but these are not consistent outside of the work area. Nothing exists for metadata or site creation. Ownership is usually Area Director, Admin Assistant and IT with only a few exceptions. Permission management is done on a site by site basis.**
6. Are metadata columns, content types, document classifications, or tagging standards currently being used within any SharePoint sites? **No**
7. What is the desired future-state approach for organizing content: folders, metadata, or a combination of both? **This will be determined through this process. IT is requesting metadata to be used but this will need to be assessed based on the audit.**
8. Are there known permission, access control, or content visibility issues that require review or remediation? **Each site is managed independently right now. If there are improvements to be made for permission moving forward that should be a part of the assessment and recommendations.**

9. What types of content are subject to HIPAA, FERPA, CJIS, CORA, 42 CFR Part 2, or other compliance requirements? **Medical records/ patient information, WIC client information, data files. CORA- applies to everything that would be reviewed as a part of this project.**
10. Are there existing records management, retention, archival, or disposition policies that must be incorporated into the solution? **Yes, there are some requirements legally we must follow. These are not well documented currently.**
11. Does PDPHE currently use Microsoft Purview, retention labels, retention policies, sensitivity labels, or records management capabilities? **No.**
12. Are there known storage limitations, performance concerns, or site sprawl issues identified by Pueblo County IT or internal stakeholders? **PDPHE utilizes SharePoint more than other County Departments. The way we are currently storing information is consuming a lot of capacity on the network.**
13. Do you expect Affirma to provide recommendations only, or to implement approved governance, metadata, permissions, retention, and organizational improvements? **We would like an analysis and recommended solutions. We will then decide on the appropriate implementation strategy but would ask the vendor to implement.**
14. If implementation is included, should improvements be applied across all SharePoint sites or only a prioritized subset identified during the assessment? **Please see answer to Q3.**
15. Do you expect Affirma to reorganize existing content, migrate documents, apply metadata to existing content, or perform content cleanup activities? **It depends on the strategy and the ease for implementation. We need to know what to do and how. Preference is for contractor to apply the solution. This can be called out separately in the proposal with a budget amount for consideration.**
16. Approximately how many sites do you anticipate requiring remediation or restructuring as part of the project? **All of the existing sites will need the defined solution applied.**
17. Do you expect Affirma to create metadata structures, content types, document templates, and governance standards? **Yes, it is preferred. At the very least, provide recommendations and discuss with management.**

18. Do you expect permissions remediation to be performed as part of the implementation effort? **Yes, it is preferred. At the very least, provide recommendations and discuss with management.**
19. Do you expect search optimization and search configuration improvements to be included in the implementation effort? **Yes, this would be fantastic.**
20. Are there plans to adopt Microsoft Copilot or other AI capabilities within the next 12–24 months? **Our IT department does not have a timeline for Copilot. They are still working on the AI policy and Copilot is typically the easiest one for government to implement.**
21. Is AI readiness expected to be a high-level recommendation, a detailed readiness assessment, or a roadmap for future implementation? **We do not expect tangible deliverables related to this. We recognize that in order to be ready to implement AI moving forward we must first get our data in a useable state which is what this project is designed for.**
22. How many administrators, site owners, and end users will require training? **Approx. 10 admins, 15 site owners (significant overlap with the 10 admins), and 90 end users.**
23. Do you require recorded training sessions, administrator documentation, governance documentation, and end-user guides as project deliverables? **Yes**
24. Will Affirma be provided the necessary SharePoint, Microsoft 365, Purview, and compliance-related administrative access required to perform the assessment? **Yes, but will require working with County IT.**
25. Following the assessment, what specific implementation activities do you expect Affirma to perform, and should those activities be applied across all sites or only a prioritized subset? **See previous answers.**