

Request for information

SharePoint Digital Workplace Transformation Programme

Organisation	ClwydAlyn
Procurement reference	CA-SP-2026-RFI-01
Publication date	16 September 2026
Clarification deadline	26 September 2026
Response deadline	06 October 2026
Response route	Via the Sell2Wales notice

THIS IS NOT A CALL FOR COMPETITION. Responses will inform scope, affordability, lotting and any future procurement route.

1 Purpose and status

ClwydAlyn is undertaking preliminary market engagement for a potential SharePoint Digital Workplace Transformation Programme. This RFI seeks feedback on supplier capability, delivery approaches, indicative timescales, costs and relevant market considerations.

This RFI seeks information to inform scope, affordability, delivery options and the route to market. It is not a call for competition or a commitment to purchase. ClwydAlyn may invite respondents to follow-up discussions to explore their approach and indicative costs or clarify information. Any subsequent quotation or tender process will be confirmed separately; participation in this RFI or follow-up discussions does not guarantee an invitation or contract award.

2 About ClwydAlyn

ClwydAlyn is a Registered Social Landlord providing general-needs homes and specialist services, including Supported Living, Extra Care schemes and Care Homes, across seven counties in North Wales. We employ more than 750 colleagues in a wide variety of desk-based, frontline, mobile and non-desk-based roles.

Our mission is "Together we will end poverty" and our values are Trust, Hope and Kindness. The digital workplace should make it easier for colleagues to find trusted information, communicate, collaborate and deliver services, regardless of role, location, device or preferred language.

3 Current position and intended outcomes

The current intranet and wider SharePoint and document environment no longer fully support ClwydAlyn's communication, collaboration, information management or future digital ambitions. The intranet is largely desktop-focused, while SharePoint sites and on-premises file shares have developed without a consistent organisation-wide structure.

Known baseline

- Existing Microsoft 365, SharePoint and Teams environment.
- Existing SharePoint-based intranet.
- Approximately 3 TB of on-premises file-share data.
- Retained volume, file count, ownership and duplication levels are not yet confirmed.
- Welsh and English user experience required.

Intended outcomes

- Provide a modern, mobile-first digital front door for all colleagues.
- Make information and services easier to find through clear navigation and effective search.
- Support bilingual content and interfaces, accessibility and inclusive use.
- Introduce sustainable ownership, governance and delegated content management.
- Improve document control, security, retention and records management.
- Replace appropriate on-premises file shares with a governed SharePoint Online solution.
- Strengthen Microsoft 365 and future Copilot readiness by improving data quality, permissions and governance.

4 Proposed lot structure

Lot	Status	Summary
Lot 1 - SharePoint Intranet	Core priority	Discovery, user experience, design, implementation, content support, governance, training and launch of a modern SharePoint intranet.
Lot 2 - Document Management and File Share Migration	Optional, complete project if awarded	Design, configuration and implementation of a governed SharePoint document management solution, including agreed file-share migration, testing, training and handover.

Any future procurement may permit bids for either lot or both. ClwydAlyn may award the lots together, separately, award one lot only or make no award. The final lot and award structure will be stated in any subsequent procurement documents.

5 Lot 1 SharePoint Intranet

Lot 1 requires the collaborative design and delivery of a high-quality SharePoint intranet involving relevant ClwydAlyn stakeholders. The proposed solution should provide a tailored and engaging user experience rather than a generic out-of-the-box site or low-cost re-skin.

- **Discovery and user research**, including stakeholder workshops and a review of the current intranet, content, analytics, ownership, search and relevant Microsoft 365 configuration.
- **User-centred information architecture and design**, providing clear navigation, effective search, priority user journeys and an accessible, responsive, mobile-first experience.
- **A bilingual Welsh and English solution**, with appropriate language switching, publishing arrangements and equivalent functionality across both languages.
- **A high-quality**, brand-aligned intranet, developed collaboratively with Communications and Marketing, IT, the Graphic Designer, departmental content owners and representative users through concepts, wireframes, prototypes and agreed review stages.
- **SharePoint Online configuration and implementation**, using supported Microsoft 365 capabilities where appropriate, including links or integrations with key business systems, audience targeting, personalisation and colleague engagement features.
- **Content and governance support**, including content rationalisation and migration, page templates, publishing controls, delegated ownership and analytics. Responsibilities for content creation and translation will be confirmed.
- **Testing**, training and implementation support, including administrator and content-owner training, launch, handover, knowledge transfer and separately priced optional ongoing support.

6 Lot 2 Document Management and File Share Migration

Lot 2 is the design and implementation of a governed SharePoint Online document management solution to replace the agreed on-premises file shares. The outcome should be a working environment in which colleagues can store, find, share and manage business documents securely, with agreed content migrated and Internal IT able to manage the solution.

The source estate is approximately 3 TB. A material amount may be obsolete, duplicated or irrelevant and excluded from migration, but the retained volume and file count are not yet known. Use 3 TB as the pricing assumption and explain potential savings if less content is migrated.

- **Discovery and assessment**, including review of the 3 TB source estate, ownership, permissions, content quality and migration constraints, working with departmental owners to identify what should migrate or be retained elsewhere.
- **Information architecture and configuration**, including sites, document libraries, metadata, appropriate folders, naming, navigation, search and version history, designed for practical day-to-day use.
- **Security and access control**, including named owners, group-based permissions, appropriate sharing restrictions and arrangements for reviewing access.

- **Retention and document governance**, including configuration and testing of retention, disposal and records controls appropriate to ClwydAlyn's approved policies, with licensing requirements identified.
- **Content preparation and migration**, including agreed cleansing and mapping, transfer to SharePoint, validation of migrated files and permissions, cutover and a plan for content excluded from migration. Closure of replaced shares must follow ClwydAlyn's acceptance.
- **Testing, training and implementation support**, including testing of the proposed solution, user adoption, administrator training, handover and support through launch. Suppliers should identify any recommended pilot or phased rollout.
- **Ownership and knowledge transfer**, including documented configuration, inventories, mappings and runbooks that ClwydAlyn can retain and reuse, and clear responsibilities for ongoing management with Internal IT.

ClwydAlyn would prefer to commission Lot 2 as one complete project if it proceeds. Suppliers should recommend the delivery approach and sequencing. The pricing headings in Appendix A are for cost comparison and do not prescribe delivery stages or separate commissions.

7 Co-delivery with Internal IT

Internal IT will work with the supplier and may undertake agreed parts of the delivery, including technical discovery, inventory collection, testing, migration preparation and repeatable configuration or migration tasks. Departmental owners will support decisions on content and access. Suppliers should state the skills, time, access and training assumed from ClwydAlyn; available capacity will be agreed.

8 Common delivery principles

- Use supported, maintainable and Microsoft 365-native capabilities wherever suitable.
- Identify custom development, premium licensing, third-party products and recurring charges.
- Build security, privacy, accessibility, Welsh-language requirements and information governance into the design.
- Provide knowledge transfer and avoid unnecessary supplier dependency.
- If both lots are awarded together, coordinate them as one programme while maintaining separate scope, deliverables and prices.

9 Indicative delivery timetable

Activity	Indicative date
Internal review and route decision	October 2026
Any future quotation or tender	To be confirmed
Lot 1 target launch	By 31 March 2027, subject to feasibility
Lot 2 delivery	Supplier to propose and cost end-to-end

10 Information requested from suppliers

Please provide a concise response of up to five pages plus the pricing tables. Suppliers may respond to either lot or both. Indicative ranges and partial responses are welcome where assumptions are stated. Please use the broad cost headings provided; individual tasks do not need to be priced.

1. Organisation, contact details and lot(s) addressed.
2. One or two brief examples of relevant experience.
3. Indicative costs or ranges using the broad headings in Appendix A for the lot(s) addressed. Use 3 TB as the Lot 2 baseline and explain potential savings if less data is migrated.
4. Principal assumptions, exclusions, licences, cost drivers and expected Internal IT contribution.
5. Recommended high-level delivery model, responsibility split and realistic timescale.
6. The three most important risks, decisions or information gaps to address before procurement.
7. Any efficiency from combined delivery and whether delivery would be alone, with a partner or as a consortium.
8. Interest in future procurement and optional open supplier briefing.
9. Optional: identify any changes that would improve clarity, competition, deliverability or value for money.

11 Pricing and submission requirements

- Use GBP exclusive of VAT. State the principal assumptions, indicative accuracy and validity of your estimate; these figures will inform affordability and are not binding offers.
- Separate assessment and design, implementation, and content or migration support using Appendix A. Include professional services, project management, expenses, testing, training and handover once within the appropriate headings.
- For Lot 2, base the estimate on assessment of the full source estate and migration of 3 TB. Identify the likely reduction in cost if only 2 TB or 1 TB migrates, and explain which costs would remain unchanged.
- State assumptions about file count, business areas, permissions, cleansing, migration waves and Internal IT effort. Distinguish any additional licences, tools and storage from service fees; price optional ongoing support separately.
- Where an element cannot be priced, state the minimum additional information required and price the elements that can reasonably be estimated.

Responses and clarification questions must use the mechanism stated in the Sell2Wales notice. Suppliers should not contact other ClwydAlyn employees about this exercise. ClwydAlyn may arrange follow-up discussions to explore responses and clarify scope, costs and delivery options. Material information from this engagement will be shared as appropriate to maintain fair access to information, with commercially sensitive supplier information handled appropriately.

Suppliers should identify commercially sensitive information and explain why. ClwydAlyn cannot guarantee non-disclosure where disclosure is legally required. Suppliers bear their own participation costs, and ClwydAlyn makes no commitment to proceed or reimburse costs.

Appendix A Indicative pricing response

Provide indicative budget ranges for each lot you can deliver. The three cost headings provide a broad breakdown for comparison; they are not a prescribed project plan. Include each cost once and state any exclusions. If an element cannot reasonably be estimated, identify the minimum further information needed. Detailed task rates are not required.

A1 Lot 1 SharePoint intranet

Cost heading	What to include	Indicative range GBP excl. VAT
Assessment and design	Discovery, user research, current intranet review, information architecture, user experience and visual design.	
Implementation	SharePoint configuration and build, templates, bilingual functionality, search, personalisation and agreed application links or integrations.	
Content and launch support	Content rationalisation and population or migration, testing, training, launch support and handover.	
Total Lot 1 services	Sum of the three headings. Include project management and expenses; exclude additional product charges and optional support reported in A3.	

State the pages and templates assumed, who writes and translates content, the extent of application integration and the launch support included. Retain the quality and scope described in section 5 when preparing the estimate.

A2 Lot 2 Document management and file share migration

Use the approximately 3 TB source estate as the baseline, assuming that 3 TB is migrated for this comparison. Assessment and design are part of the whole project; a price for assessment alone is insufficient to inform the decision.

Cost heading	What to include	Indicative range GBP excl. VAT
Assessment and design	Review the full 3 TB source estate, requirements, ownership and permissions; design the target architecture, retention and migration approach.	
Implementation	Configure the SharePoint sites, libraries, metadata, search, versioning, security and agreed governance and retention controls.	
Migration and adoption	Agreed content preparation, migration of 3 TB, any recommended pilot, validation, cutover, user and IT training, handover and closure support.	
Total Lot 2 services	Sum of the three headings. Include project management, expenses and launch support; exclude additional product charges and optional support reported in A3.	

Reduced volume: indicate the estimated saving against the 3 TB total if only 2 TB is migrated, and if only 1 TB is migrated. Approximate ranges or percentages are acceptable. Explain which assessment, configuration or other costs remain unchanged; savings need not be proportional to data volume. If savings cannot yet be estimated, state the information needed.

State the file-count, permission, cleansing and migration-wave assumptions and the work and estimated time required from Internal IT and departmental owners. Identify what further information would allow a firmer overall price.

A3 Additional costs and combined delivery

Additional costs GBP excl. VAT	Lot 1 indicative range	Lot 2 indicative range
One-off licences and tools		
Total initial cost Services plus one-off licences and tools		
Annual licences, tools and extra storage		
Optional annual support		

Itemise only the main additional products or subscriptions and state any existing Microsoft 365 licence and storage assumptions. Enter nil where no additional cost is expected. Annual support should state its scope, start point after included launch support and any change in price over Years 1 to 3. Identify shared charges once if both lots proceed.

Combined delivery: if responding to both lots, indicate any saving against the separate initial costs, using the 3 TB Lot 2 baseline. State the amount or percentage, what it applies to and any conditions. A separate detailed combined proposal is not required.