



TEACHERS' RETIREMENT SYSTEM OF THE STATE OF ILLINOIS

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QUESTIONS/ANSWERS – SHAREPOINT CONSULTING SERVICES

1. What is the anticipated start date and duration of the contract?
We hope to start the project in December of 2024. The contract term will be for the length of the project, 12-18 months.
2. What is your target completion date?
12-18 Months.
3. What is forecasted budget of the contract?
We will not be disclosing our budget for this project
4. Can you provide historical spending data for similar services to better understand the scope of the financials?
Not Applicable.
5. Can you provide the name of the incumbent vendor and the previous project cost, if applicable?
Not Applicable.
6. Do you have a preferred pricing model for this engagement (e.g., per user, per device, or fixed fee)?
Please Bid as described in the form provided in Appendix E, Fee schedule.
7. Is it mandatory that the vendor should be a MBE/WBE/DBE/VOB firm?
No. However, the System strongly encourages qualified minority, female, disabled, and veteran-owned firms to submit proposals to this RFP.
8. Is support required during the engagement only, or is TRS interested in ongoing support for the intranet after it is live?
Support during the engagement but will be re-evaluated during the engagement to determine if ongoing support would be needed, which may require another bid process.

9. Will TRSIL accept services from resources located outside of the continental United States (i.e., Canada)?

TRS will accept services from resources located in the continental United State and Canada.

10. Are you open to a hybrid delivery model with a mix of offshore and onshore resources?

We will accept onshore resources.

11. Are there any on-site requirements for the consulting or support teams, or will the services be entirely remote?

We prefer an initial on-site introductory meeting to ensure a thorough understanding of your requirements and to establish a strong working relationship. Following this, we are flexible and are open to discussing consulting and support services entirely remotely.

12. What specific documents and resources will be accessible through the SharePoint intranet?

Internal TRS documents saved in a variety of formats (PDF, Word, Excel, PowerPoint). These documents will be valuable for helping to provide visibility, alignment, and communication across the organization and teams.

13. Are you using Microsoft Teams?

Yes.

14. Do you have any SharePoint site currently in place?

We are currently using SharePoint Online and on-premises for some departmental pages across the enterprise.

15. How many existing Microsoft 365 licenses (e.g., G1, G3, G5) does the organization currently have?

We currently own Microsoft E5 licensing but will not disclose the number that we own. If there is a need to procure more/different licenses for features/functionality, that can be discussed during the engagement.

16. Are there any specific plans for expanding the number of licenses during this project?

Answered above

17. What Microsoft licenses does TRS have for its SharePoint environment?

On-premise and SharePoint Online.

18. Will you be using SharePoint Online or SharePoint on-premise? If on-premise, what version please.

Transitioning all on-premise pages to SharePoint Online. On prem version is 2016.

19. What version of SharePoint is TRS currently using?

On-prem is 2016, but part of this project is to transition away from on-premise SharePoint, to SharePoint online.

20. How many users do you have? Please provide the internal and external users who utilize this intranet site?

We have approximately 300 internal users, external users can vary and will be limited to those given permission to do so.

21. How many internal users will access and manage the SharePoint system as part of the managed services?

Less than 20 site administrators will be required.

22. Are there any additional security certifications or protocols that the vendor should adhere to?

Chosen vendor will be required to work with internal Cybersecurity staff to determine the standards required.

23. Besides update management, user management, and firewall management, are there any additional security services required for the SharePoint environment?

See previous response.

24. Are there specific security, compliance, or accessibility standards that must be met?

See previous response, the compliance and accessibility standards are of interest to the project.

25. How will access controls be reviewed and managed to ensure they follow industry standards?

Internal and external audits and penetration tests will be performed to verify compliance.

26. What measures will be taken to enable audit tracking and logging of user activity?

Microsoft Purview will be leveraged to audit user activity and login, other analytics and reporting within SharePoint Online or other dashboards.

27. How will the backup frequency and retention period be determined and managed?

Regular backups will be performed by internal IT staff and is not required for this engagement.

28. Can you clarify any specific compliance requirements for data protection (e.g., HIPAA, GDPR) that need to be incorporated into the SharePoint solution?
The use of industry best practices to secure data and PII (personally identifiable information) will be required.
29. How many TRS departments will be involved and/or need collaboration sites?
Approximately 20 TRS departments will be engaged.
30. What departments would be involved with intranet/communication site?
Each department within the organization will be involved.
31. How many departmental sites/pages do you anticipate requiring in the implementation.
Approximately 20.
32. What specific customizations and enhancements are anticipated for the SharePoint intranet?
Specifications will be determined during future requirements gathering sessions within TRS. Once requirements are gathered, they will be shared.
33. How will the unique business processes and pain points of TRS be addressed?
Regularly scheduled meetings with internal staff and committees, and the chosen vendor, will be utilized to address any pain points or business process concerns.
34. What testing resources will be provided to verify successful implementation?
TRS will provide internal resources to test and help ensure successful implementation.
35. Could you please provide more specifics on the administrative controls required for departmental pages?
There will be tiers of administrative rights. Each department will have a designee who will be tasked with administrative responsibilities for their respective departmental page.
36. Who are the primary stakeholders collaborating with the vendor, and what are their roles?
Specific staff names and roles will be shared with the selected vendor.

37. Is there a backup solution currently in place?

Yes.

38. Could you kindly provide details on the current disaster recovery plan, including backup frequency and retention?

Not applicable.

39. Does TRS have or plan to acquire a third-party backup solution (e.g., AvePoint)?

No.

40. Can you provide details on the server infrastructure that will host SharePoint and other integrated systems? Are any on-premises servers involved?

SharePoint on-line will be leveraged.

41. Are there any specific network devices that need to be managed as part of the SharePoint solution?

No.

42. Are there any specific user devices (e.g., desktops, laptops) that will need support within the SharePoint environment?

No.

43. Will the vendor be considered third-tier support? If not, please provide more details on support expectations.

During the engagement, yes, the vendor will be third-tier support. A post-deployment transitional support plan will be required. All other future support will be determined during the engagement.

44. Do you have predefined branding (Themes and standards) for an intranet site?

We have a style-guide that identifies colors and logo standards that align with our branding standards.

45. Could you kindly confirm if there are existing themes or branding guidelines that need to be followed?

We have a style-guide that identifies colors and logo standards to be used.

46. Could the TRS please confirm if any data migration process included in this project? If yes, Please explain in detail.

Currently there are no plans to migrate on-premise data directly to SharePoint Online sites during this engagement.

47. Are all files currently in SharePoint?

No.

48. Could you kindly provide insights on how documents and files are currently structured, and if there will be a migration of existing content?

New structuring standards will be implemented during this engagement. Any data that exists inside the on-premise SharePoint, will be evaluated and migrated by TRS staff. SharePoint Online data should be considered and evaluated with the vendor and TRS staff during the engagement.

49. Is there any data that will be needed to be migrated to the new Intranet as part of the project scope. If there is, how much data is there and where does it reside?

See above response.

50. Could you kindly provide insights on how documents and files are currently structured, and if there will be a migration of existing content?

See above response.

51. Are there any specific types of documents that should be prioritized during the integration?

See above response

52. Could you please clarify the expected level of integration with current social media channels?

Basic levels of integration with social media channels will be a part of the engagement, with the possibility of more advanced levels of integration.

53. Would you kindly let us know if the calendar system should integrate with existing calendaring solutions or if it will be standalone?

Yes, integration with existing business calendars.

54. Could you kindly let us know what internal systems need to be integrated with SharePoint, and whether custom integrations will be necessary?

HCM, Phone System, Future ITSM solution, Data/Analytics platforms.

55. Could you kindly explain how the SharePoint solution should integrate with your existing business continuity strategies?

At this time, there are no requirements to add integration regarding business continuity.

56. Are any workflows required as part of the project scope, if so please define them.

At this time, there are no requirements for workflows as a part of the current project scope.

57. What are the internal systems you would be looking to integrate to. Is integration to those systems part of the project scope?

HCM, Phone System, Future ITSM solution, Data/Analytics platforms.

58. Please explain what is meant by integration with Microsoft 365 (since SharePoint Online is part of Microsoft 365).

Other applications inside the Microsoft 365 suite such as Teams, Office, Azure Dev Ops.

59. How will the integration with Microsoft 365 and other internal systems be achieved?

Through collaboration between chosen vendor and TRS staff.

60. What kind of analytics tracking will be implemented to monitor intranet usage and engagement?

Existing Data/Analytics platforms, as well as dashboards/metrics provided from SharePoint Online.

61. Please define "other internal systems" and provide of list of systems to be integrated.

HCM, Phone System, Future ITSM solution, Data/Analytics platforms.

62. Could you kindly specify the metrics or KPIs you are aiming to track with intranet analytics?

Page load performance, Devices & operating systems, Audience location, Unique users, User churn, Viva Connections users, Top sites, Top links, Navigation, Search results, round trips per page.

63. Please outline the custom enhancements that you are looking for.

This question is not clear enough to answer, need "custom enhancements" defined.

64. Could you kindly confirm what testing resources or environments are available for verifying custom enhancements?

With SharePoint Online, there is not a test environment currently, but open to discuss the need/requirement of this with chosen vendor. Current practice is to develop the content, and when ready, publish and give access rights.

65. Could you please provide details on the current access control model, and if there are any specific industry standards the solution must adhere to?

Industry best practices regarding least privilege, proper password management, granted guest access.

66. Are there any specific systems or applications that require real-time monitoring and proactive maintenance beyond SharePoint?

No.

67. Could you provide more details on the volume of content expected for the newsfeeds?

This question is not specific enough to provide an answer.

68. How will the newsfeeds be managed and updated?

Key staff will be charged with managing newsfeeds.

69. How will the integration with TRS social media channels be handled?

We would like social media feeds to be displayed on key pages.

70. What measures will be taken to ensure mobile-first content is accessible on all devices?

This should be a responsive design as a part of this engagement.

71. Does TRS' Active Directory profiles have the current manager listed?

Yes.

72. Could you kindly let us know the data sources for the employee directory, and whether real-time synchronization is required?

Active Directory, synchronizing regularly.

73. How will the employee directory and organizational charts be maintained and updated?

Direct synchronization from Active Directory.

74. What are the standards and themes that departmental pages must follow?

We have a style-guide that identifies colors and logo standards that align with our branding standards.

75. Could you kindly confirm if there are specific mobile platforms that require optimization?

iOS, Android.

76. Regarding E. Technical Expertise question #4, “How do you maintain audit trails and manage changes?” Is this question in relation to how the SharePoint solution will manage versioning and history, or is it related to the operations of the proponent?

It is related to the operations of the proponent.

77. Could you kindly confirm if there are existing tools for audit tracking and logging, or whether these will need to be implemented?

See above response.

78. What training model does TRS desire (e.g., train-the-trainer)?

Train the Trainer Model.

79. Could you kindly provide details on how many end-users will require training, and if there are any preferred formats for this training?

10-15 using Train the Trainer model.

80. What kind of training and guidance will be provided to end-users?

Once Train the trainer sessions are complete, training and guidance for remaining staff could include group/all-staff meetings, down to individual “desk-side” training sessions.

81. Are there predefined response and resolution times for different levels of service requests (e.g., critical, high, medium, low)?

This would be determined if a post-go live support agreement is needed/agreed upon.

82. Is the helpdesk support expected to be 24/7 or only during business hours?

Core business hour support only by the selected vendor if a post-go live agreement is needed.

83. What level of technical support will be provided, and through which channels (phone, email, helpdesk)?

This will be discussed if a post go live support agreement is needed.

84. How will user-reported issues be troubleshooted and resolved?

This will be discussed if a post go live support agreement is needed.

85. Could you kindly share the current levels of technical support and user satisfaction, and whether you have specific SLAs in place?

This will be discussed if a post go live support agreement is needed.

86. Could you kindly describe any unique business processes that the SharePoint intranet will need to address?

None at this time but could evolve during the engagement dependent upon recommendations from chosen vendor.

87. Under IV. Proposal Content, there are 2 sections named B - Cover Letter and Vendor Type Verification Form. Please clarify.

There should not be two sections named B. The Cover Letter and Vendor Type Verification Form are two separate sections, and both are required to submit as part of your proposal.

88. Under Appendix D: Questionnaire - Part D Proposed Services, question 1 : Provide a description of your proposed approach, detailed services to be provided and an estimated timeline for each bullet point of the proposed services outlined in Section III. Please copy and paste each bullet in section III as a separate item and explain your experience in each area. Can you clarify if we need to explain our experience in the main bullet points A - F or also the bullet points within each of these.

Please explain your experience for each bullet point within A-F.

89. Under IV. Proposal Content - G. Contract, are we to fill and attach the sample Contract in the response document?

Please submit any contractual concerns to our attached sample agreement as part of your response.

90. Can the Agency share the required key personnel/LCATS for this contract?

During the initial discussions once the vendor is selected.

91. Is the Teacher's Retirement Systems looking for someone to join a team? Or are they looking for just one person or one firm, or 2-3 people to help with the SharePoint system?

TRS is looking for vendor resources to help with a 12-18-month engagement to stand up new SharePoint departmental sites, with the possibility of a post go live support agreement to be discussed.

92. What is the average workload?

The question is not specific enough to provide an answer.

93. Is there any customization on the current SharePoint?

There are no custom workflows at this time.

94. What type of licensing have you acquired: business, enterprise, government or non-profit?

E5 licensing for 365.

95. What level of licensing have you subscribed to for the users?

E5 licensing for 365.

96. Do you have a relationship with another vendor who acquired your licenses? If so, does this vendor manage your Admin Center?

No.

97. Do you have a need to allow guest access?

Yes.

98. Do you currently have an Intranet setup in SharePoint Online? If so, are you using the classic or modern experience? If not, how are you using SharePoint Online?

Yes, modern experience.

99. In review of the System's web site, we believe a department site will be required for Operations, Finance, HR/Benefits, Public Relations, and Legal. If additional departments exist/will require a site in the SharePoint Intranet, please identify them. Or, if you don't agree with this list. please correct it.

Additional departments include Member Services, Employer Services, Internal Audit, Cybersecurity.

100. Will the Board of Directors and each of the Committees require a working space to share files and messages?

No.

101. Do you have processes requiring automation, or would benefit from automation, that will be included in this project? If so, please identify the processes and whether they are simple, moderate or complex in nature. EX. Form routing for approval.

Yes, to be determined during the engagement with selected vendor.

102. We generally submit bids for projects on a fixed fee basis. Would the System accept a bid of this kind or do you prefer time and materials with positions, rates and hours as identified in Appendix E of the RFP?

Please propose time and materials with positions, rates and hours as identified in Appendix E of the RFP.

103. Section F of the RFP states, “The fee proposal must expressly state that the proposed fixed fee is guaranteed for the term of any resulting contract.” while Appendix E asks for vendors to provide an hourly rate. Fixed fee typically indicates a deliverable based pricing model. Is TRS seeking a fixed-fee or time/materials proposal in response to this solicitation?

The sentence is incorrect in Section F. Please propose time and materials with positions, rates and hours as identified in Appendix E of the RFP.

104. What is the anticipated volume/number of resources needed to accomplish the agency’s objectives?

This would need to be determined by the chosen vendor, dependent upon the requirements of the overall project.

105. Has the agency already defined the business requirement for all services under bullets in Section III?

a. For example, what is the anticipated volume of “Departmental pages” and are the content/layout/design requirements already defined for these pages? How many unique page types? No.

b. For example, under Item C: Integrations with External Systems” has the agency defined which and how many systems will be integrated into the SharePoint intranet? No.

106. Could you please consider extending the submission deadline by 1-2 weeks?

No.

107. How will we gather requirements from end-users and stakeholders?

TRS Staff will do requirements gathering, to share with the chosen vendor.

108. What level of involvement do stakeholders expect throughout the project?

This is dependent on the stakeholder’s role in managing the pages/content on their respective site.

109. What metadata and taxonomy will be necessary for effective content management?

Will be defined during the engagement

110. How can we ensure a user-friendly interface for all users?

Working in collaboration with TRS staff, this will be a requirement of the engagement, to ensure a user-friendly interface for all pages, related to all platforms, and meeting accessibility standards.

111. What governance policies will be established for content management?
This engagement will require assistance in the establishment of governance.
112. Does the scope of testing include Automation Testing?
No.
113. Are there any existing resources or tools that the vendor can leverage during the project?
No.
114. Are there specific reporting requirements that the vendor needs to adhere to?
Project status reports, regular engagements with key stakeholders.
115. Are there any potential challenges or risks that TRS anticipates with this project?
Universal adoption of the new pages and functionality.
116. How will success be measured for this implementation?
User adoption, and positive site metrics.
117. How will we gather feedback from users after the implementation?
This will be dependent upon post go live agreements if needed.
118. How will we measure the ongoing success and effectiveness of SharePoint?
This will be dependent upon post go live agreements if needed.
119. Ref# Section F - We hope detailed TRS will provide the detailed unique business requirements which needs to be developed as part of custom features. please confirm.
We will provide.
120. Ref# Section C - Describe the necessary integration with Microsoft 365. Will there be data consumption from other applications?
This question is not clear enough to provide an answer.
121. Ref# Section C – Can you provide an overview of how internal systems will be integrated?
HCM, Phone System, Future ITSM solution, Data/Analytics platforms.
122. Ref# Section A – Could you please outline the high-level details of integrating with social media channels?

Basic levels of integration with social media channels will be a part of the engagement, with the possibility of more advanced levels of integration.

123. Ref# Section C - Will TRS allow third party analytics tool like Google analytics?

Yes, dependent upon the scenario.

124. Would you be open to some or all the work (e.g. development, testing) being done remotely?

We prefer an initial on-site introductory meeting to ensure a thorough understanding of your requirements and to establish a strong working relationship. Following this, we are flexible and are open to discussing consulting and support services entirely remotely from the US or Canada.

125. How many vendors do you state intend to award a contract to?

We plan to only award to one vendor.

126. We are registered with State of Board of election. Do we still need to register with State of IL? If yes, can we register upon the award? Please confirm

We only require that you are registered as a business entity with the State Board of Elections.

127. What does your IT team look like? How many people support IT work? What kind of experience/qualifications do they have?

We have a full functioning IT Team.

128. What level of personalization are you wanting folks to have? (i.e. being able to subscribe to news & events based on department, personalize my tools (quick links) that the team can choose from?)

This will be identified through the engagement process, but the listed personalization would be desired.

129. There is mention around the training site and having events posted from there. Is there a need as well to have it so folks can sign up for trainings from SharePoint?

Potentially.

130. What level of customization and/or enhancement functionality do you envision as part of this project? If you have already identified areas where customization will be required, please describe these customizations and their intended purpose in as much detail as possible.

This will be identified during the engagement with the selected vendor.

131. What is your strategy for mobile access to the intranet? Are there specific mobile functionalities you are looking to implement?
Standard mobile access is preferred.
132. Could you provide more information on the type and number of resources TRS expects for this engagement? Are there specific skill sets or certifications you are prioritizing for the project team?
This will need to be defined by the selected vendor dependent upon the agreement and SOW.
133. Please confirm the anticipated period of performance for the project, including any key project milestones or deadlines that should be considered as we prepare our proposal.
12-18 months.
134. Is this project focused on new development or redevelopment of an existing portal? Additionally, could you provide some background on the current state of the portal and any specific goals or challenges that this project aims to address?
This engagement will require a full review of the pages in production, to determine efficiency gains needed, and will be standing up new departmental pages that don't currently exist. There are existing SharePoint online pages in production currently.
135. Under Point D Reference Checks, could the System please confirm that Appendix C has to be signed by the vendors and not by the reference?
Appendix C, Reference Authorization Letters, are to be signed by the vendor submitting the proposal.
136. Appendix D Questionnaire, could the System please confirm if vendors can copy and paste each question in the proposal response and address each question since the Appendix does not have space for vendors to provide a detailed answer?
Yes, you may copy and paste each question to provide a more detailed answer.
137. Could the System please clarify if there is a page limit for the resumes requested?
There is no page limit for resumes submitted, however, Bidsubmissions@trsil.org has a limit of 100 MB. Senders can use WinZip to compress and shrink the size of the email.
138. Appendix D Questionnaire, required three clients with contact information, could the System please clarify if vendors can provide the same clients as the ones provided in the reference section?
Yes, you may provide the same clients as the ones provided in Appendix C.

139. Could the System please clarify if the personnel/staff proposed can be replaced when the contract is awarded in case they are no longer available?

Yes.

140. Under Point G Contract, could the System please clarify if vendors are required to provide a written statement for this point in the proposal response?

Please submit any contractual concerns to our attached sample agreement as part of your response.

141. Can vendors provide commercial references?

Yes, vendors may provide commercial references.

142. Can vendors provide ongoing contracts as references?

Yes, however, we would prefer to see references for projects completed.

143. How many references do vendors have to provide?

We would like you to provide at least two references

144. Can vendors provide subcontractor references?

No, we would not like subcontractor references.

145. Could the System please clarify if is it allowed to use digital signatures?

Yes, the System is allowed to use digital signatures.

146. Is it required to provide the Good Standing Certificate alongside the proposal response?

No.

147. Is it required to provide the Certificate of Insurance (COI) alongside the proposal response?

No.

148. Could the System please confirm that we can fill out proposal forms electronically?

Proposals should be in an Adobe Acrobat format. Bidsubmissions@trsil.org has a limit of 100 MB. Senders can use WinZip to compress and shrink the size of the email.

149. Could the System please clarify if, under Point G, vendors are required to attach Appendix F?

Please submit any contractual concerns to our attached sample agreement, Appendix F, as part of your response.

150. Is there a page limit for the proposal response?

Bidsubmissions@trsil.org has a limit of 100 MB. Senders can use WinZip to compress and shrink the size of the email.

151. Could the System please confirm whether vendors should submit a single document with the proposal response?

You do not need to submit a single document. You may have attachments and exhibits. Proposals should be in an Adobe Acrobat format

152. Could the System please confirm whether vendors should submit a single document with the proposal response?

A single page is not necessary. You may provide attachments and exhibits.

153. In Appendix A and B, should vendors indicate "Yes" or "No" where applicable?

In Appendix A, please check one of the vendor types and sign the form. In Appendix B, please initial each as applicable.

154. Should Appendix C be signed by the prime consultant or the reference firm?

Appendix C, Reference Authorization Letters, are to be signed by the vendor submitting the proposal.

155. What are the preferred formats and sources for the video content that will be hosted in the Video Message Portal?

None defined at this time.

156. Could the System provide examples or details about the types of departmental and company-wide news feeds you envision?

Currently unknown but will be defined during the engagement with the chosen vendor.

157. What specific document management features are required, such as version control, access permissions, or document lifecycle management?

All.

158. Are there existing employee directories and organizational charts that need to be imported into SharePoint, or will these need to be created from scratch?

Likely from scratch and integrated with Active Directory.

159. Can the System elaborate on the themes and standards that need to be followed for departmental pages?

We have a style-guide that identifies colors and logo standards that align with our branding standards.

160. What internal systems need to be integrated with SharePoint, and what are the key functionalities required for these integrations?

HCM, Phone System, Future ITSM solution, data/analytics platforms

161. What specific analytics and reporting metrics are you looking for in intranet usage and engagement tracking?

Page load performance, Devices & operating systems, Audience location, Unique users, User churn, Viva Connections users, Top sites, Top links, Navigation, Search results, round trips per page.

162. Could the System provide more detail on the unique business processes and pain points that the SharePoint implementation should address?

None at this time but could evolve during the engagement dependent upon recommendations from chosen vendor.

163. What kind of testing resources or processes does the System envision for verifying successful implementation?

Will be defined during the engagement.

164. What are the current access control standards and practices in place, and how does the System envision them being applied or enhanced in SharePoint?

Industry best practice standards are followed.

165. What is the current backup frequency and retention period for your systems, and how does the System envision this being incorporated into SharePoint?

TRS has defined backup strategies, and retention requirements, but incorporation into SharePoint is not a requirement at this time.

166. Could the System provide more details on your Disaster Recovery plan and how you foresee SharePoint fitting into this strategy?

SharePoint will not be required for DR.

167. Are there specific recovery time objectives (RTO) and recovery point objectives (RPO) that need to be met?

Not at this time.

168. Is the implementation for SharePoint online?

Yes.

169. What is the current state of TRS's SharePoint: Does TRS currently use SharePoint, or will this be a new implementation? If something other than SharePoint is currently used, please explain.

We are in a hybrid solution currently, we have some on-premise sites and pages, and we also have several SharePoint online sites functioning.

170. Is the implementation for SharePoint online?

Yes.

171. Does the implementation consider the integration of power apps and power automate on the initial deployment?

Will be discussed with the chosen vendor.

172. Where does the content used/to be accessed via SharePoint currently reside?

Either on-prem, or in the current SharePoint online pages/documents libraries.

173. What is the known or estimated volume of documents used via SharePoint or other platform currently used by TRS?

This is a relative question. Volume can be ambiguous in nature depending on the context.

174. Does the current active directory structure include dynamic groups, or will security be manually managed on the SharePoint side?

Site permissions are managed through on-prem AD groups that are created for each site and follow the SPO permissions structure for Owners, Members, and Visitors.

175. Is the SharePoint deployment expected to be federated and allow external users to access if appropriate rights are granted?

Yes.

176. Will any SharePoint content be shared externally? Is semantic search and document taxonomy expected to be included in the implementation? If so, has the taxonomy already been created or would that need to be considered as part of the criteria gathering?

External user access may be granted. Semantic search and taxonomy will be discussed at the time of engagement with the chosen vendor.

177. Is the expectation of the deployment to meet current functionality needs and define a roadmap of potential improvements or should commonly elected improvements be scoped in the initial deployment?

Will be defined during the engagement.