Administration
Information & Technology Service

BOSTON PUBLIC HEALTH COMMISSION
REQUEST FOR PROPOSALS (RFP)
No. ITS-001a-23

Microsoft Dynamics Great Plains Upgrade

January 10, 2023

Issued by
Boston Public Health Commission
1010 Massachusetts Ave, 2nd Floor,
Boston, MA 02118

ADVERTISEMENT

BOSTON PUBLIC HEALTH COMMISSION
INFORMATION TECHNOLOGY SERVICES

MICROSOFT DYNAMICS GREAT PLAINS UPGRADE
Project No. ITS-001a-23

INVITATION TO INTERESTED, RESPONSIBLE, AND COMPETENT PERSONS OR FIRMS
ENGAGED AS MICROSOFT AUTHORIZED RESELLER/CONSULTANTS TO APPLY AND
RESPOND TO A REQUEST FOR BID FOR THE BOSTON PUBLIC HEALTH COMMISSION

The Boston Public Health Commission's, Information Technology Services Department invites
competent persons, consultants, firms, or corporations to apply for a request for proposal for the
Microsoft Dynamics Great Plains Upgrade and to perform such work in coordination with BPHC
Officials.

Copies of the Request for Proposal (RFP) may be obtained online at Bids and RFPs | Boston.gov on
or after January 10, 2023

APPLICATIONS MUST BE SUBMITTED DIRECTLY TO: INFORMATIONAL TECHNOLOGY
SERVICES OF THE BOSTON PUBLIC HEALTH COMMISSION 1010 Massachusetts Avenue, 2nd
floor Boston, MA 02118. Applications must be in a sealed envelope. The front of the envelope must
be labeled "**RFP For Microsoft Dynamics Great Plains Upgrade**".

Submission for such work will be accepted until 3:00 PM on February 6th, 2023.
LATE PROPOSALS WILL NOT BE ACCEPTED.

RFP INFORMATION

Contact:	Steve Barrus, Director of Enterprise Applications
Email Addresses:	ITSRFP@bphc.org
Submittal Date	**02/06/2023**

PLEASE SUBMIT ALL CORRESPONDENCE AND PROPOSALS
VIA E-MAIL DIRECTLY TO THE PROCUREMENT CONTACT LISTED
ABOVE AND INCLUDE "RFP FOR MICROSOFT DYNAMICS GREAT
PLAINS UPGRADE" IN THE SUBJECT LINE

Request for Proposal Timeline	
Tuesday, January 10, 2023	Publication of RFP printed in The Boston Globe
Tuesday, January 10, 2023	Request for Proposal with instructions available online at Bids and RFP at 10:00 AM
Tuesday, January 17, 2023	Questions concerning RFP are due via email by 5:00 PM to ITSRFP@bphc.org Subject: Question for RFP Microsoft Dynamics Great Plains upgrade
Friday, January 20, 2023	Responses to questions will be posted in an addendum on Bids and RFPs | Boston.gov
Tuesday, February 6, 2023	RFP due by 5:00 PM – Submit original (5) proposals signed in blue ink below in a sealed envelope or box addressed to and email a PDF file of a proposal to ITSRFP@bphc.org: Boston Public Health Commission Attention: Information Technology Services 1010 Massachusetts Avenue, 2nd Floor Boston, MA 02118 Clearly mark each envelope: 1) Company Name and Address; 2) "RFP For Microsoft Dynamics Great Plains Upgrade" **NO EXCEPTIONS TO THIS DEADLINE**
Tuesday, February 13, 2023	Notification of Decision desired date to award however, BPHC has the discretion to extend this time period without notice to the proposers. All proposals shall remain valid and open for a period of one hundred twenty (120) days from the proposal submission date unless a proposer notifies BPHC of its withdrawal.

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SECTION 1 – INTRODUCTION

The Boston Public Health Commission (BPHC) is the local public health department for the City of Boston. BPHC's mission is to protect, preserve, and promote the health and well-being of all Boston residents, particularly the most vulnerable. The Information Technology Services (ITS) is responsible for maintaining the Microsoft Dynamic Great Plains (GP) software and is hosted on the Microsoft Azure cloud environment. In conjunction with the Finance Department at BPHC. The Finance Department currently uses Microsoft Dynamic Great Plains (GP) 2018 for maintaining the general ledger and project accounting modules in Great Plains (GP) 2018, creating and implementing adequate internal controls, preparing timely financial statements and reports, overseeing GL and grant audits, managing cash, overseeing grant compliance and monitoring, creating accurate budgets, processing bills, overseeing revenue compliance, managing the purchase orders for procurement of goods and services, processing payment of vendor invoices and collections related to accounts receivable. The Finance Office primarily uses Microsoft Dynamics Great Plains (GP) 2018 for accounting, post-award Grants, Procure-To-Pay (Purchase Orders and Accounts Payable) and Revenue (Cash Receipts), ReQlogic for Procure-To-Pay (procurement and payments including routing approvals), Oracle Hyperion for Budget, ADP for Payroll and CareLogic for Revenue (third party billing).

As part of BPHC's efforts to have an equitable procurement process, BPHC will consider and encourage Certified Unrepresentative Businesses Enterprises(CUBE) that includes; Minority-owned Business Enterprises (MBE), Women-owned Business Enterprises (WBE), Veteran-owned Business Enterprises (VBE),Disability-owned Business Enterprise (DOBE), Lesbian Gay Bisexual Transgender Business Enterprises (LGBTBE), Minority Non Profit(MNPO), Women Non Profit(WNPO), Minority Women Non Profit(MWNPO) and local businesses to apply to this RFP.

SECTION 2 – INSTRUCTIONS TO RESPONDERS

Steps for Completing Your Response	Follow the steps below to complete your response to this RFP: Step 1: Read the solicitation document and ask questions, if any Step 2: Write your response Step 3: Sign and submit your response
Incomplete Submittals	A proposal must be submitted along with any required additional documents. Incomplete proposals that materially deviate from the required format and content may be rejected.

STEP 1 – READ THE SOLICITATION DOCUMENT & ASK QUESTIONS, IF ANY

How to Ask Questions	The Information Technology Services contact email address for questions is: Email: ITSRFP@bphc.org & Procurement@bphc.org Questions must be emailed to ITSRFP@bphc.org & Procurement@bphc.org by Tuesday, January 17, 2023. Other personnel are not authorized to answer questions regarding this RFP.

STEP 2 – WRITE YOUR RESPONSE

Request for Proposals	The RFP starts in Section 3. Insert your response to the questions as asked or provide content as requested in the **scope of work**. By signing this response, your firm is making a legal, binding offer for a contract to provide services to the Boston Public Health Commission.

STEP 3 – SIGN & SUBMIT YOUR RESPONSE

Where to Send Your Response	Mail your response to:
	    Boston Public Health Commission
	    Attention: Information Technology Services
	    1010 Massachusetts Avenue, 2nd Floor
	    Boston, MA 02118
	    ITSRFP@bphc.org
	Fax responses will not be accepted. All costs incurred in responding to this RFP will be borne by the Responder.

Response Submission Deadline	Responders should mail and email their responses. Mailed responses must be received no later than 3:00 p.m., Eastern Time, Tuesday, February 6th, 2023, as indicated by a notation made by the BPHC Front Desk receptionist; emailed responses must be received by the same date and time at: ITSRFP@bphc.org & Procurement@bphc.org.

SECTION 3 – PROJECT INFORMATION

A. Description of Project

Boston Public Health Commission (BPHC) requests for proposals to provide assistance in performing an upgrade from Microsoft Dynamics GP 2018 to Microsoft Dynamics GP 18.4 with the latest update, or most current version. The Finance Department at BPHC currently uses Microsoft Dynamic Great Plains (GP)2018 for maintaining the general ledger and project accounting modules in Great Plains (GP) 2018, creating and implementing adequate internal controls, preparing timely financial statements and reports, overseeing GL and grant audits, managing cash, overseeing grant compliance and monitoring, creating accurate budgets, processing bills, overseeing revenue compliance, managing the procurement of goods and services, processing payment of vendor invoices and collections related to accounts receivable.

B. Scope of Work

The objective of this project is to assist in performing an upgrade from Microsoft Dynamic Great Plains (GP) 2018 to Microsoft Dynamics Great Plains (GP) 2018 R2 with the latest update, or the most current version, ensuring that the new updates don't negatively impact any of the day-to-day functionalities of the general ledger system currently in place. The current GP environment is hosted on Microsoft Azure Cloud.

BPHC seeks assistance with an approach that includes the following steps:

1. Assist and oversee advanced project planning (March 2023 – June 30, 2023) and project management for the duration of the project (March 2023 – May 31, 2023)
2. Upgrade to Microsoft Dynamics GP 2018 18.4 or the most current version and currently installed companion products* code and data to Microsoft Dynamics GP version 18.4 or the most current version —pre-production and production in the Azure cloud environment
3. Upgrade Microsoft Dynamics GP Modified Reports Dictionary and Modified Forms Dictionary per installed product and module from GP version 2018 to version Microsoft Dynamics GP 18.4 or the most current version, and document process— pre-production and production in the Azure cloud environment
4. Migrate and transfer Microsoft Dynamics system and company SQL databases to Dynamics GP 18.4, or the most current version—pre-production and production in the Azure cloud environment
5. Upgrade Microsoft Dynamics Management Reporter to support Microsoft Dynamics GP 18.4, or the most current version, and document process—pre-production and production in the Azure cloud environment
6. Upgrade the Microsoft SQL 2016 Enterprise server to SQL 2019 or the most current version, and document process—pre-production and production in the Azure cloud

environment

7. Update integrations to internal and external systems
8. Update the Smart List Builder configuration. All existing Smart Lists in GP need to remain functional and available for use
9. Remove and or delete all the outdated/obsolete Smart Lists not required
10. Update and test the GP custom Time and Billing window for Grants
11. Update and or upgrade GP custom scripts
12. Update and automate the GP integration with ADP
13. Update and or Implement SSRS reports for GP
14. Archiving the old GP database as a part of this upgrade, so that we can improve the software's performance
15. Integrate Microsoft Great Plains (GP) 18.4 or the most current version with ReQlogic for Procure-To-Pay (procurement and accounts payable including routing approvals), Oracle Hyperion for Budget, ADP for Payroll, FastPath—Config AD/SSP, Audit Trails, and CareLogic for Revenue (third party billing)
    - Automate GP integration with Change Healthcare third-party billing software for Revenue
    - Create and automate weekly files to transmit to Bank of America, to pay vendors electronically, and support the positive pay control process, which must still work once the upgrade takes place
    - Confirm that 3rd party vendors such as McKorma liaison and Greenshades (1099) are still functional in P2P after the upgrade
16. Review and update existing VBA macros. All macros must remain functional and available for use post upgrade implementation.
17. Propose reporting tools outside of Management Reporter
18. Provide workstation installation documentation and up to one (1) hour of installation instruction
19. Provide up to thirty (30) hours of introduction, training, and review of the new features in Microsoft Dynamics GP version 18.4 or the most current version. These sessions will most likely be in 2–4-hour increments
20. Project lead the finance and ITS staff testing phase and provide sufficient hours of post-production upgrade assistance over a period of 3 months
21. Maintain an active punch list of ongoing issues and problems. Devise a feasible plan to resolve all punch list items before the project end date (5/31/2023). The resolution of all punch list items are included in the scope of this agreement. If any punch list items remain open at 05/31/2023, the vendor is responsible to resolve them in a timely manner.

Responders are encouraged to propose additional tasks or activities if they will substantially improve the results of the project. These items must be separated from the required items on the Cost Proposal (See Section 4).

The responders will work closely with BPHC Information Technology Services staff and the Finance Department's staff during the entire implementation process

On-site project activities will occur primarily at:

Boston Public Health Commission
1010 Massachusetts Avenue, 6th Floor
Boston, MA 02118

C. Minimum Qualifications Required

The Responder must have a current Microsoft "Customer Source" account to have the ability to download Dynamics GP from Microsoft.

D. Desired Skills

BPHC desires a Responder with in-depth knowledge of Microsoft Dynamics, ReQLogic, FastPath, Oracle Hyperion applications, and integration with ADP.

E. Response Evaluation

Responses will first be reviewed to confirm compliance with the minimum qualifications identified above. Responses that meet all the minimum qualifications will be further evaluated in accordance with the following:

Factors	Percentage
Qualifications	30%
Approach to Project	30%
Cost *	40%

*Proposals will be evaluated on "best value". The cost proposal will not be opened by the review committee until after the qualification points are awarded.

All responses received by the deadline will be evaluated by representatives of the Boston Public Health Commission. Proposals will first be reviewed for responsiveness to determine if the minimum requirements have been met.
Proposals that fail to meet minimum requirements will not advance to the next phase of the evaluation. BPHC reserves the right, based on the scores of the proposals, to create a short-listing of vendors who have received the highest scores to interview, or conduct demonstrations/presentations. BPHC reserves the right to seek the best and final offers from one or more Responders.

SECTION 4 – VENDOR RESPONSE

INSTRUCTIONS: Fill in the information requested below.

1. Responder Contact Information

Company's Full Legal Name:	
Business Address:	
Contact Person's Name:	
Telephone Number:	
E-Mail Address	

2. Qualifications

Describe the company background. Detail the experience and qualifications of all personnel proposed to work on the project.

3. Approach to Project

Describe your overall approach to do the work. How will you accomplish the goals of the project? Who will do the work, titles and years of experience. How many people will be assigned to this project? What do you see as the timelines and final deliverables?

4. Alterations or Additions to the BPHC Terms & Conditions

If you wish to take an exception to the BPHC's Terms and Conditions (see Section 5), please indicate that below and attach any appropriate documentation.

☐ None

☐ See attached document detailing proposed alterations and/or additions to the BPHC's terms and conditions.

SECTION 5 – COST PROPOSAL

Follow the instructions below when completing your Cost Proposal.

The responder must submit a cost proposal that details a list of all deliverables and a corresponding cost for the performance of each deliverable. Detail the number of hours estimated to complete each deliverable and all hourly rates utilized and calculate the total of each deliverable.

Cost Proposal

	Deliverable/Description	Hours	Rate	Total
1	Dynamics GP and third-party integrations including the scope of work: Pre-production and Production in the Microsoft Azure Cloud environment			
2	Training, troubleshooting, and new feature review including the scope of work – Pre-production and production in the Microsoft Azure Cloud environment			
3	Custom development and Support including the scope of work			
	TOTALS			

Responders may propose additional tasks or activities if they will substantially improve the results of this contract. Describe additional work and list hours/fees.

***Optional* Cost Proposal**

	Deliverable/Description	Hours	Rate	Total
1	*Other (describe)*			
2				
3				
	TOTALS			

SECTION 6 – RESPONDER CERTIFICATIONS

The responder must check each box to certify the conditions required under this RFP. Please note that some certifications may require the submission of additional information. Sign below to finalize the response.

A. **Required**

   ☐ I have read and am aware of the **Boston Public Health Commission Standard terms and conditions**, which are attached to this RFP

   ☐ I have read and am aware of the **BPHC's standard contract terms and conditions**

   ☐ **Non-collusion Affirmation.** I certify

      ☐ That I am the Responder (if the Responder is an individual), a partner in the company (if the Responder is a partnership), or an officer or employee of the responding corporation having authority to sign on its behalf (if the Responder is a corporation).

      ☐ That the proposal submitted in response to the RFP has been arrived at by the Responder independently and has been submitted without collusion with and without any agreement, understanding, or planned common course of action with, any other Responder of materials, supplies, equipment, or services described in the RFP, designed to limit fair and open competition.

      ☐ That the contents of the proposal have not been communicated by the Responder or its employees or agents to any person not an employee or agent of the Responder and will not be communicated to any such persons prior to the official opening of the proposals.

   ☐ That I am fully informed regarding the accuracy of the statements made in the proposal.

By signing here, I warrant that the information provided in this proposal is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate or misleading information may be grounds for disqualification from contract award and may subject me/my company to suspension or debarment proceedings, as well as other remedies available to the State, by law.

Signature   Title   Date