



Boston Public Health Commission
Information and Technology Services Department

Request for Proposal
Migration and Redesign of SharePoint 2007

November 16, 2018

RFP Timeline	
Friday, November 16, 2018	Publication of RFP printed in The Boston Globe
Friday, November 16, 2018	Request for Proposal available online at bphc.org/RFP
<i>To Be Determined</i>	Mandatory Pre-bid conference (in person and online)
Wednesday, November 28, 2018	Questions due in writing by 5:00PM to Doreen Corban, Director at DCorban@bphc.org .
Friday, November 30, 2018	Responses to questions posted on www.bphc.org/RFP . Please check website for any addenda prior to submitting bid.
Tuesday, December 4, 2018	<p>RFP due by 5:00 PM – Please submit two (2) original printed RFP and USB drive in a sealed envelope or box, addressed to:</p> <p style="text-align: center;">Boston Public Health Commission Attention: Doreen Corban, IS Director 1010 Massachusetts Avenue, Floor Boston MA 02118</p> <p>Clearly mark each envelope with: 1) Company Name and Address; 2) “Proposal Enclosed” for Migration and Redesign of SharePoint 2007</p> <p style="text-align: center;">There are No exceptions to this Deadline.</p>
December 3 - 7, 2018	Qualified vendors contacted to schedule onsite demonstration of proposal
December 10 - 14, 2018	<p>Vendor Demonstrations will be scheduled accordingly and will take place at:</p> <p style="text-align: center;">Boston Public Health Commission 1010 Massachusetts Avenue Boston MA 02118</p>
Friday, December 28, 2018	<p>Notification of Decision</p> <p>This is the desired date for notification of award, but 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 sixty (60) days from the proposal submission date, unless a proposer notifies BPHC that it is withdrawing its proposal.</p>

Table of Contents

1. Request For Proposal Purpose	4
2. General Information.....	7
3. Mandatory Pre-Bid Conference	7
4. Scope Of Work	7
5. Proposal Requirements.....	7
6. General Conditions and Insurance	9

1. Purpose

1.2 General Information

BPHC seeks to migrate its current SharePoint 2007 intranet content into a SharePoint Online with Nintex Workflow environment. This will include the design, migration and implementation of a new intranet site based on key stakeholder requirements. The new site will utilize modern communication and team sites to align with BPHC branding. We also intend to utilize the collaboration and social media capabilities available with SharePoint Online.

1.3 Submission of Proposal

The proposal must be received in a sealed envelope by BPHC via registered mail, courier, or hand delivery no later than: **5:00 P.M. local time, Tuesday, December 4, 2018** (the "closing deadline").

Proposal package must include two (2) original hard copies and thumb drive of submission.

Proposals must include a completed and signed Summary Form of Proposal plus Appendix 1 including requested documents. Proposals received after the closing deadline will not be accepted. There will be no public opening for this RFP.

The responsibility for submitting RFP to the Boston Public Health Commission on or before the stated time and date will be solely and strictly the responsibility of the proposer. The Commission will in no way be responsible for delays caused by the United States Mail service or caused by any other occurrence.

1.4 Enquiries

Questions regarding this proposal should be directed in writing by 5:00PM, Friday, November 28, 2018 to:

Doreen Corban, IS Director
Email: dcorban@bphc.org

1.5 Submission Format & Checklist

Submit the following: two (2) original signed in blue ink including all appendix, numbered consecutively and unbound and a PDF file of proposal on a labeled USB flash drive with all required information, following in the order outlined below. Do **not** bind proposals.

Check when Complete	Proposal Documents	Page	Signature Required where X
<input type="checkbox"/>	Title Page and Transmittal Letter as described in Section 4.1	8	-
<input type="checkbox"/>	Understanding of Scope of Work as described in Section 4	7	
<input type="checkbox"/>	Work Plan and Methodology as described in Section 5.3	8	-
<input type="checkbox"/>	References as described in Section 5.4	8	-
<input type="checkbox"/>	Completed Summary Form of Proposal	12	X
<input type="checkbox"/>	Reference Form	13	
<input type="checkbox"/>	All addenda <i>(if applicable)</i>	-	X

Failure to submit all of the above information may result in disqualification from the review process.

Proposer Contact

Signature: _____

Printed Name: _____

Title: _____

Date: _____

1.6 Evaluation Criteria

Evaluation of proposals and selection will be performed by BPHC. Proposals will be evaluated in terms of the response to the requirements of this RFP using the criteria identified below in Table A – Initial Evaluation. Proponents that score **75 points or greater** will be asked to demonstrate their application to a user group and will be further evaluated as per the criteria in Table B – Demonstration.

Table A – Initial Evaluation

Section	Points Assigned
Project Functionality <ul style="list-style-type: none"> • Requested Features (Appendix 1) • Additional Features 	30
Cost of Project <ul style="list-style-type: none"> • Product Features • UI Design • Implementation • Training • Support 	50
Methodology and Approach	10
Experience and References	10

Table B – Demonstration

The demonstration will be through a web-based presentation and will be attended by users of the software including finance and non-finance staff.

Section	Points Assigned
Ease of use <ul style="list-style-type: none"> • Functionality • Features 	50
Management information and reporting capabilities	30
Understanding of BPHC's requirements for all user groups	10
Demonstration using relevant information and examples	10

1.7 Proposal Timeline

- Vendor proposal demonstrations will occur during the week of December 3-7, 2018.
- BPHC plans to make its selection decision by December 28, 2018
- Post selection, the awarded proposer will be contacted to set a primary meeting to finalize all terms of the agreement. The contract resulting from this RFP is formed when BPHC approves and signs the applicable BPHC Standard Contract. Service shall then begin on the date of the contract start date agree upon.
- This project must be completed before June 30, 2019.

2. General Information

2.1 Background

The Boston Public Health Commission (BPHC) is issuing a Request for Proposal (RFP) to migrate our 2007 SharePoint environment to SharePoint Online which will include project management of the entire project, pre-migration testing, requirements gathering with key stakeholders, create an ADA compliant design and migration plan, configuration of BPHC's SharePoint Online environment to allow collaboration with external partners, develop site templates using SharePoint modern sites in accordance with BPHC branding, install and configure the Nintex workflow platform.

BPHC is funded by a combination of sources: city funded through an annual appropriation; third party revenue; State of Massachusetts, Federal, and private non-profit grant awards. FY19 Commission-wide expenses budget is \$160M from all sources. There are approximately 1200 employees, 25% of whom are unionized labor. The Commission manages 200+ distinct projects varying in budget from \$200K to several million dollars. In addition, the core of the Commission's projects conforms to the City of Boston and State of Massachusetts fiscal year that runs from July 1 to June 30. Those same projects are subject to the same policies regarding budgeting for fringe benefits and indirect costs. However, a significant portion of the Commission's portfolio is grant funded and therefore subject to timeframes and fiscal constraints determined by the sponsor.

BPHC seeks to migrate the current BPHC Intranet to SharePoint Online with Nintex and Azure AD to keep up with current technology standards and to allow better collaboration internally and with our external partners, to facilitate the update and improvement of current SharePoint processes and to create new ones more efficiently and effectively. The intention of this migration is to help improve overall productivity and should greatly reduce the need for external access accounts like VPN.

2.2 Technical Requirements

BPHC currently has Office 365 Pro Plus installed with Azure on prem and Sharegate subscription.

3. Mandatory Pre-Bid Conference

In order to assist in determining a bid amount, a mandatory pre-bid conference must be scheduled by all interested parties in order for BPHC to demonstrate the current intranet site and answer questions about the future of the Commission's intranet.

4. Scope of Work

Working closely with BPHC IS staff the scope of work for the project is as follows:

- Review existing SharePoint 2007 Intranet site and perform a migration assessment.
- Discovery and requirements to determine final scope of project
 - ADA compliance required in new environment
 - Set up of team sites for collaboration with external partners
- Migrate data from current environment to new environment.
- Create and implement new UI design for the entire SharePoint Site,
- Create and implement new Modern look and feel for the SharePoint sites.
- Create and implement new style customizations per requirements.
- Develop and implement new Home page
- Purchase, install and configure Nintex Workflow with a standard edition subscription for 20 workflows.
- Provide project management throughout the project.

5. Proposal Requirements

Proposals must address the items listed below:

5.1 Title Page and Transmittal Letter:

- A title page providing the proponent's name, contact person and title, address, and contact information; and
- A signed letter briefly stating the proponent's understanding of the services required, benefits they bring to the project, the commitment to perform the services as requested in this RFP, and all addenda, if applicable.

5.2 Scope of Work:

- Develop a short narrative demonstrating the proponent's clear understanding of the objectives and key features of the proposal;
- The proponent should describe their product and list the suggested services believed to be necessary for the successful implementation of their solution. The requested features are listed in Appendix 1. As well, any suggested implementation and support services should be outlined in detail;
- Detail any assumptions the proponent has made in preparing the proposal; and
- Include any other services not identified in the Scope of Work.

5.3 Work Plan and Methodology:

- The proposal should be clear and concise with a methodology and corresponding task list that details the steps to complete the project, fully understand all issues and concerns, secure adequate data to be used to carry out the various activities required and address how all aspects of the Scope of Work will be carried out;
- Provide details of any customization that is required to implement your solution, including: areas or modules where customization is required/recommended, the skill set and effort it takes to complete such a customization, and the assistance you provide with the customization; and
- Proposals should discuss the organizations' approach to software updates – how frequently updates are issued, ability to evolve with newer versions of underlying software etc.

5.4 References:

- Provide a minimum of three (3) and a maximum of five (5) selected projects. Information should include detail on past projects the proponent has completed for municipalities or public health agencies that are similar in size to BPHC. Specifically highlight any municipalities that are using Microsoft Dynamic Great Plains (GP) financial software.

5.5 Pricing:

Using the Summary Form of Proposal, proponents shall provide details about individual costs for:

- Software - including each module component outlined in their proposal to provide the Requested Features (i.e. operating, capital, salary, reporting);
- UI Design
- Implementation of installation;
- Training;
- Annual support costs (3 Years); with option of 2 Year extension with BPHC approval
- Annual licensing costs, including cost per user license (3 Years); with optional Years
- Separate pricing shall be provided for any additional requirements outside the scope of work that the proponent feels would benefit the BPHC and be clearly identifiable.

6. General Conditions and Insurance

6.1 Discrepancies or Omissions

Proponents finding discrepancies or omissions in the RFP documents, or having any doubts to the meaning or intent of any part thereof, should immediately notify Doreen Corban, in writing via email at dcorban@bphc.org who may send written instructions or explanations to all proponents on record with BPHC.

No responsibility will be accepted for oral instructions.

Addenda or correspondence issued during the RFP period shall be considered part of this document and become part of the final contract documents. Addendums will be posted on bphc.org/RFP.

6.2 Irrevocability of Proposals

Prior to the time and date of the RFP closing deadline, any proposer may withdraw or change their proposal without penalty or forfeiture, by giving notice via email to:

Doreen Corban, IS Director
dcorban@bphc.org

Upon the closing deadline, all proposals become irrevocable and no words or comments may be added to, or removed from, the proposal unless requested by the BPHC for purposes of clarification. By submission of a proposal, the proponent agrees that should its proposal be deemed successful, the proponent will enter into a contract with the BPHC.

Proposals must include all costs incidental to the successful implementation of the system(s).

Proposals must remain valid for a period of sixty (60) days following the date for submission of proposals.

6.3 Liability for Errors

While the BPHC has used considerable efforts to ensure an accurate representation of the information in this RFP, the information contained in is supplied solely as a guideline for proponents. The information is not guaranteed or warranted to be accurate by the BPHC, nor is it necessarily comprehensive or exhaustive. Nothing in this RFP is intended to relieve proponents from forming their own opinions and conclusions with respect to the matters addressed in this RFP.

6.4 Agreement with Terms

By submitting a proposal, the proponent agrees to all the terms and conditions of this RFP. Proponents who have obtained the RFP must not alter any portion of the document, with the exception of adding information requested.

6.5 Modification of Terms

The BPHC reserves the right to modify the terms of the RFP at any time at its sole discretion.

6.6 Proponent Expenses

Proponents are solely responsible for their own expenses in preparing a proposal and for subsequent negotiations with BPHC, if any. If BPHC elects to reject all proposals, BPHC will not be liable to any proponent for any claims, whether the costs or damages incurred by the proponent in preparing the proposal, loss of anticipated profit in connection with any final contract, or any other matter whatsoever.

6.7 Proposal Acceptance and Rejection

BPHC may not necessarily accept the lowest priced proposal or any proposal. At its sole discretion, BPHC reserves the right to reject any or all proposals received and to accept any proposal which it considers advantageous, whether or not it is the lowest priced proposal.

Submission of a proposal by a proponent and its subsequent receipt by the BPHC does not represent a commitment on the part of the BPHC to proceed further with any proponent or project. BPHC is under no obligation to award a contract as a result of this RFP and reserves the right to terminate this RFP process at any time.

BPHC reserves the right to accept the proposed offer in total or in part, to reject any or all offers, to waive any minor informalities, irregularities, or technicalities, and to accept the offer deemed most favorable to BPHC.

Proposals must meet all the requirements herein to be eligible for consideration. Proposals that are unsigned, incomplete, conditional, illegible, unbalanced, obscure or that contain additions not called for, reservations, erasures, alteration, or irregularities of any kind may be rejected.

The BPHC reserves the right to obtain additional information from the proponents to clarify the information in their submission.

The Boston Public Health Commission may during the proposal review process, or at any time prior to award, cancel this RFP or reject all Proposals, if BPHC determines its best interest will be served by such action. Notice of the cancellation will be made to the applicants or potential applicants. BPHC also reserves the right to award the contract(s) as best serves to the organization.

6.8 Contract

The successful proponent will be required to enter into a contract with the Boston Public Health Commission.

BPHC reserves the right to negotiate specific terms of the contract with the preferred proponent prior to the final award of the contract.

If the preferred proponent and BPHC cannot agree on contract language in the contract document, the process will be terminated, BPHC will begin negotiations with the next preferred proponent.

6.9 Solicitation

Proponents and their agents are hereby warned that any attempt to solicit individual members of the board members and/or staff of BPHC, regarding the award of this contract may jeopardize the favorable consideration of their proposals.

6.10 Confidentiality and Security

This document or any portion thereof may not be used for any purpose other than submission of proposal. The successful proponent shall agree not to divulge or release any information that has been given to it or acquired by it on a confidential basis during the course of carrying out its duties or performing its services. It is BPHC's policy to maintain confidentiality with respect to all confidential information related to the RFP, but BPHC is subject to the Freedom of Information and Privacy Act.

6.11 Indemnity and Liability Insurance

For the purpose of any contract, BPHC may enter into with the successful proponent, the Contractor shall indemnify and hold harmless to BPHC, its employees and agents, from any or all claims, demands, actions, and costs whatsoever that may arise, directly or indirectly out of any act or omission of the Contractor, its employees, or agents, in the performance by the Contractor of this Agreement. Such indemnification shall survive termination of this Agreement.

The Contractor must provide to BPHC proof of \$2 million General Liability Insurance with BPHC named as an additional insured party. BPHC reserves the right to modify the type of insurance coverage and amount coverage (which may include increasing the amount of coverage) required to be carried by the Contractor.

6.12 Scope, Quality of Work, Guarantee

The Contractor shall furnish all labor, materials and equipment necessary to perform and complete the work called for in the specifications, plans or other instructions attached to or referred to in the resultant contract. All work shall be done in a professional manner by those skilled in their respective trades. The Contractor will comply with BPHC's schedule unless BPHC formally declares and approves alternate times.

6.13 Obligation

This RFP is not a tender call, and any submission of any response to this RFP does not create a tender process. This RFP is not an invitation for an offer to contract, and it is not an offer to contract made by BPHC. No proponent will acquire any legal or equitable rights or privileges relative to the goods or services until BPHC has accepted its proposal and there is subsequent full execution of a written contract signed by both parties.

The lowest or any proposal will not necessarily be accepted. BPHC reserves the right to waive informalities, to reject any or all proposals for any reason, or to accept the proposal deemed most favorable in the interest of BPHC. In no event, will BPHC be responsible for the costs of preparation and submission of proposals.

6.14 Freedom of Information

The Boston Public Health Commission is subject to the provisions of the Freedom of Information Act. Thus, BPHC cannot guarantee that any information provided can be held in confidence.

6.15 Conflict of Interest

The Contractor shall disclose in its proposal any actual or potential conflict of interest and any existing business relationships it may have with BPHC, its elected or appointed officials, or employees. BPHC has the right to reject any proposal submitted by a proponent who in BPHC's determination, has, or if awarded the contract would have, an actual, perceived or potential conflict of interest.

Summary Form of Proposal

Name of Project: *Migration and Redesign of SharePoint 2007*

Description Cost:

Software (operating, capital, salary & reporting modules)	\$ _____
UI Design	\$ _____
Implementation costs	\$ _____
Training	\$ _____
Annual support costs (years 1 – 5)	\$ _____
Annual licensing costs, including cost per user (years 1 – 5)	\$ _____
Additional fees (include description)	\$ _____

Submission Requirements:

Proof of insurance (liability and professional liability)
W9 Tax Form

Signed and submitted for and on behalf of:

Proponent: _____
(Company Name)

By: _____
(Print Name and Title)

(Authorized Signature)

Executed this _____ day of _____, 20_____



Reference Form

Request for Proposal: Migration and Redesign of SharePoint 2007

Date Released: November 16, 2018

Applicant Information

Company / Entity Name: _____
Contact: _____
Telephone: _____
Email: _____

List three (3) service contracts related or similar to the scope of service as described within the past ten (10) years.

Business Reference 1

Company or Entity: _____
Contact Name & Telephone: _____
Brief Description of Work: _____
Amount of Contract: _____
Contract Start / End Date: _____

Business Reference 2

Company or Entity: _____
Contact Name & Telephone: _____
Brief Description of Work: _____
Amount of Contract: _____
Contract Start / End Date: _____

Business Reference 3

Company or Entity: _____
Contact Name & Telephone: _____
Brief Description of Work: _____
Amount of Contract: _____
Contract Start / End Date: _____