



Contract Management Power Apps Development Project

Request for Proposal – Vendor Questions and Responses

RFP Due Date: Monday, February 24, 2025

Q1: Are there any specific business requirements vendors need to meet, such as licenses, registrations, or insurance?

A: Nothing specific but if you have any of these please include them in your proposal.

Q2: Does the City have a preference for local vendors or vendors with an established presence in the area?

A: No preference; however, do prefer to work with a vendor who operates in the East Coast Time Zone (EST)

Q3: Is this opportunity set aside for small businesses, such as those owned by minorities, women, or veterans? If so, is there a specific participation percentage required to qualify?

A: Small businesses are encouraged to apply, but this opportunity is not set aside specifically for small businesses.

Q4: Are there any minimum qualifications or experience levels vendors must meet?

*A: Vendors must hold a minimum of **Microsoft Certified Gold Partner** status, possess at least **4 years of proven experience** with Microsoft Power Platform, and demonstrate **5+ years of engagement with public agencies** (e.g., government or public-sector organizations) to ensure technical expertise, platform proficiency, and familiarity with public-sector operational requirements.*

Q5: Are references required as part of the proposal? If yes, how many references are needed, and are there any guidelines on the type of references (e.g., client type, project size, etc.)?

A: Yes, in your proposal, provide 3 business references whom you provided services of similar size and scope.

Q6: For quote preparation, should vendors only follow the Requirements Section as outlined in the solicitation? Is there a specified content organization or template format vendors must use for submission?

A: There is no preference for presentation style; however, your proposal must be in PDF format.

Q7: Are there any evaluation criteria or guidelines vendors should be aware of when preparing the quote?

*A: Yes, your proposal will be scored based on how closely the vendor meets the requirements and at the lowest cost. Also, BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies.*

Vendors must hold a minimum of **Microsoft Certified Gold Partner** status, possess at least **4 years of proven experience** with Microsoft Power Platform, and demonstrate **5+ years of engagement with public agencies** (e.g., government or public-sector organizations) to ensure technical expertise, platform proficiency, and familiarity with public-sector operational requirements.

Q8: Could you please provide the estimated budget or funding range for this project to help us align our proposal accordingly?

A: There is no established budget; however, we would like to keep the cost as low as possible.

Q9: What is the desired GO LIVE date?

A: June 30, 2025

Q10: Is there a not to exceed budget?

A: There is no established budget; however, we would like to keep the cost as low as possible.

Q11: Please describe the current system from which data and files must be imported into the new system, including size, structure, data export interfaces.

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q12: Please confirm if the current system will be used until new system goes live or it will be on freeze during development of the new system.

A: It will be used until a new system is in place.

Q13: How many concurrent requests daily? How many pending requests within 30 days?

A: We receive and complete on average 100 requests per month.

Q14: Please describe BPHC team members, skills, experience and roles during development, KT and post go-live support.

A: BPHC has 2 staff who should be able to take on some of the development tasks, for example, building out forms and workflows. One staff member is a developer who has worked with the power platform for about 6 months but has a fair understanding of it and has built a few small processes by customizing Sharepoint list forms and creating workflows. The other staff member has been using the Power Platform for about 5 years and has built a number of small applications including the current Contract Management application, an application to manage attendance and services for Boston's homeless population that are assigned to six area shelters and a canvas application used to track pregnancy and STI testing for high school students. These applications along with other automated processes were also built primarily by customizing Sharepoint forms and building workflows.

Q15: How many users will utilize Contract Management apps and how many Power App licenses are procured? Additionally, are Power Apps premium features feasible for consideration?

A: All users have a Office 365 Power Apps license. We expect to need up to 135 Power Apps “per app” licenses. We currently have a few licenses for the SQL premium connector. We will consider the addition of premium features.

Q16: Are all BPHC users are in Azure AD?

A: Yes

Q17: How are the roles such as BA, BA/PD, GC, P2P etc. defined in Azure (security groups, M365 groups, not defined)?

A: Our intention is to store/manage these roles/names in a Sharepoint list that will be used to populate fields in the application forms unless there is another suitable solution recommended to accomplish this.

Q18: Will Vendors and Customers need to access the Contract Management system? If yes, will they be Entra guest users or BPHC need anonymous level access for them?

A: At the present time only BPHC staff will access this application.

Q19: Should there be any limit for vendors to submit new outgoing funds request?

A: No. All requests will be made internally.

Q20: What are the requirements for reporting based on metadata?

A: To be determined.

Q21: Are there Accessibility constraints for the app? (such as Grade-C or above)

A: Not that we are aware of.

Q22: From an admin perspective, should admin/super admin screen be available, if so, what should be the scope?

A: Not that we are currently aware of however, BPHC may consider this.

Q23: The RFQ states a model-driven app requested rather than Canvas or D365 or Logic apps. Please confirm if that is a way to go, or BPHC would like to review pros-n-cons in scope of initial architecture and design phase.

A: The primary reason for requesting a model-drive app was after viewing proof of concept demos in both MS Dynamics and a model-driven app and to keep costs down particularly with regard to licensing but BPHC would be willing to hear any pros and cons.

Q24: Please confirm if Dataverse is a storage of choice or SharePoint or BPHC would like to review pros-n-cons in scope of initial architecture and design phase.

A: We would like the data to be stored in Dataverse but BPHC would be willing to hear any pros and cons.

Q25: Does BPHC have Dataverse licenses procured, how many?

A: BPHC will purchase the required number of Dataverse licenses.

Q26: What Microsoft 365 subscription BPHC owns?

A: BPHC owns the **Microsoft 365 Government G3** subscription, a cloud-based productivity suite designed exclusively for U.S. government agencies. This license provides access to Microsoft 365 tools (e.g., Teams, SharePoint, Exchange) with enhanced compliance, security, and data residency features tailored to meet federal, state, and local government requirements, ensuring adherence to strict regulatory and operational standards.

Q27: Does BPHC have SharePoint configured, at tenant level, and at site level?

A: Yes

Q28: Please clarify if retention/DLP policies should be built to ensure data storage for 7 years prior to archiving.

A: Our max requirement is to store data for at least 7 years.

Q29: Should the new system be operable from mobile devices? If yes, what types?

A: Not at this time however, BPHC would be open to hearing recommendations for this.

Q30: Are there any requirements for automated integration with other systems or APIs (e.g. with SAM)? If yes, with which systems?

A: Ultimately we would like to integrate this system with ReQlogic for the reporting dashboard and Microsoft Dynamics Great Plains to pull the list of vendors.

Q31: Could you please let me know what type of response the agency is looking for?

A: At this time, we are only looking for a cost proposal

Q32: Do we need to provide only a cost proposal?

A: Yes.

Q33: What is expected to be submitted as part of the cost proposal?

A: Line-item cost proposal for each phase of the project.

Q34: How do you want us to break down the cost?

A: Line-item cost proposal for each phase of the project.

Q35: Is there a timeline for this project? If yes, please let me know the start date and end date.

A: Expected start date to be determined. Desired go live date: June 30, 2025

Q36: How many BPHC team members will be assigned to this project?

A: 2 team members that we expect can help with some development tasks.

Q37: What level of experience do they have with Power Platform and Power BI (Beginner, Intermediate or Advanced)?

A: Power Apps/Automate – Beginner to Intermediate, PowerBI – Beginner

Q38: How many hours per week will they be able to support the project?

A: 15-20 hours per week combined.

Q39: What level of mentorship does BPHC entail?

A: Our goal is to make sure the app framework is set up correctly by the vendor. We have experience with building forms and workflows. We are not very familiar with the model driven app however but want to learn more so we can support this app. We would like the vendor to work with us to determine what level of support BPHC staff can provide.

Q40: Would it involve holding daily Q&A sessions, answering technical questions?

A: We don't believe this will be required depending on what tasks the vendor can assign to BPHC. We hope to be able to help with building forms, workflows and any other configurations we can manage. If we run into issues with our assigned tasks, we would like to be able to contact the vendor for support.

Q41: If yes, how long would you like each session to be?

A: A few sessions may be needed to explain how things are set up so that we have a better understanding of how to support it post go live. We will also need to contact the vendor for support if we run into issues with the tasks assigned to us.

Q42: Would it involve daily technical sessions, teaching the team certain aspects of MDA development?

A: Possibly, it would be helpful to have the vendor go over how things are set up and how they work overall.

Q43: If yes, how long would you like each session to be?

A: It is suspected an hour per session might be sufficient.

Q44: Would you need an Avid Development resource to be available during business hours to answer questions via Teams?

A: If we run into issues with the tasks we are charged with during the development phase, we would like to be able to contact your team for support during the hours of Monday – Friday 9:00 AM – 5:00 PM.

Q45: Is the vendor responsible for final system deployment to production?

A: Yes

Q46: Does Boston DPH utilize Azure DevOps for Power App/Automate solution deployments?

A: This should be available if needed by the vendor.

Q47: Would Boston DPH consider a Time & Materials not to exceed contract? (This would allow us to price as if we are doing everything, but we'd have maximum flexibility in this model in terms of utilizing their staff for meaningful work.)

A: BPHC cannot accept Time & Materials (T&M) proposals due to budget constraints and requires a fixed-price turnkey solution to ensure predictable costs. While the internal team's involvement percentage is undetermined, vendors may propose assumptions about role/responsibility splits and include a rate card for reference in supplementary documentation. However, the proposal must provide a fixed total cost, with potential adjustments discussed post-award once internal capacity is clarified.

Q48: Does Boston DPH have the Power App licenses required to utilize Dataverse?

A: Not at this time BPHC will purchase the required licenses.

Q49: What are the key evaluation criteria for selecting the awarded vendor?

A: Qualified vendors who most closely meet the requirements, possess the required experience and at the lowest cost.

Vendors must hold a minimum of **Microsoft Certified Gold Partner** status, possess at least **4 years of proven experience** with Microsoft Power Platform, and demonstrate **5+ years of engagement with public agencies** (e.g., government or public-sector organizations) to ensure technical expertise, platform proficiency, and familiarity with public-sector operational requirements.

Q50: Is there a defined budget range or cap that vendors should consider when preparing their pricing proposal?

A: Not at this time.

Q51: Are there any specific formatting guidelines, mandatory inclusions, or submission requirements for the proposal?

A: Please submit proposals in PDF format. Mandatory inclusions are - Proposal, budget, organization qualification & references.

Q52: What are the minimum technical and financial qualifications that bidders must meet?

Bidders must meet the following **minimum technical and financial qualifications**:

Technical:

- **Certifications:** Microsoft Certified Gold Partner status and Power Platform certifications (e.g., Solution Architect Expert).
- **Compliance:** Adherence to **HIPAA, FTI, PCI DSS**, and Massachusetts data security laws (e.g., 201 CMR 17.00).
- **Experience:** At least **4 years of Power Platform implementation expertise** and **5+ years working with public agencies**.

Financial:

- Demonstrated ability to deliver **fixed-cost turnkey solutions** with transparent pricing models.

- No financial qualifications are required, this request is to receive proposals on cost to support this project

Proposals must validate these qualifications through case studies, references, and compliance documentation

Q53: Are there any required certifications, past performance criteria, or eligibility requirements for vendors?

*A: Yes, vendors must meet the following requirements: **Microsoft Certified: Power Platform Solution Architect Expert certification** is mandatory, and prior experience working with **public agencies** is required as part of past performance criteria to ensure alignment with public-sector standards and project needs.*

Q54: What level of collaboration is expected between the selected vendor and BPHC's internal Power Apps team?

A: We would like the vendor to work with us to determine what tasks our Power Apps team could perform (i.e., form building and workflows) and provide support on an as needed basis to work out any obstacles that may come up during development.

Q55: Will the vendor be responsible for ongoing support and maintenance, or will the internal team fully take over post-development?

A: The internal team will support the app after launch.

Q56: Are there any preferred security or compliance standards that the solution must adhere to?

A: We use Role-Based Access Control and MFA using Azure Active Directory.

Q57: Will BPHC provide access to any existing systems or data sources that need to be integrated with the new contract management application?

A: Yes

Q58: Can you provide details on the current licenses you have for the application?

A: All users have a Power Apps license, and BPHC will purchase per app licenses as needed.

Q59: How many users will be accessing the application?

A: 135 max.

Q60: If you are considering a Model-Driven Power App, are you planning to use Power Apps Premium licenses, or would you prefer a Dynamics 365 for Sales license, which provides additional functionality and a full system for future enhancements?

A: At this point we would like to go with the Model-Driven App.

Q61: The scope states that we will be developing the core framework of the application. Will our team be responsible for the full initial development of forms, views, and fields, or will this be a collaborative effort with your team?

A: BPHC would like as much of this project to be a collaborative effort as possible.

Q62: The RFQ mentions technical mentorship as part of the project. Will we have full access to the necessary systems and environments to effectively mentor your teams?

A: Yes

Q63: Can you clarify your expectations for technical mentorship—are you looking for structured training sessions, hands-on guidance during development, or general advisory support?

A: General advisory support with some possible hands-on guidance if needed.

Q64: The scope states that current data and files must be imported into the new system. Where do you intend for documents to be stored—in SharePoint or Dataverse or another document management system?

A: Currently the plan is to store all data/documents in Dataverse.

Q65: The scope states that current data and files must be imported into the new system. What system(s) are we migrating data from and documentation from?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q66: Are you looking to track emails and activities centrally within the Model-Driven app?

A: Not at this time.

Q66: If so, what level of integration with Outlook or other communication tools is required?

A: None

Q67: Does the application need to be mobile-friendly?

A: Not at this time but may be considered.

Q68: If yes, are there specific functionalities that must be optimized for mobile use?

A: Not at this time but may be considered.

Q69: We noticed that several fields are set as choice fields. If these fields need to be edited or changed frequently, would you be open to using a lookup to a list instead, allowing for easier updates without modifying the application itself?

A: Possibly

Q69: What type of Power Automate license is currently available in the tenant?

*A: BPHC currently has **Power Automate Premium for Government licenses** in its tenant. These licenses are specifically designed for government entities, offering advanced automation capabilities with compliance and security features that align with public-sector requirements to ensure adherence to strict regulatory standards for data handling and governance.*

Q70: How many environments are available for development, testing, and production?

A: We currently only have one environment to build and test before rolling out to production. Creating a backup dev environment would be desirable.

Q71: Are there any existing business processes implemented that require enhancement or optimization?

A: Yes

Q72: Is the vendor responsible solely for technical architecture and planning, or will they also be involved in the implementation process?

A: The selected vendor will also be involved in the implementation process.

Q73: What is the scope of the vendor's involvement in the system deployment?

A: The vendor will be responsible for all development/deployment tasks aside from tasks assigned to the BPHC Power Apps team.

Q74: How should tasks be allocated between the vendor and the BPHC Power Apps team?

A: BPHC would like their Power Apps team to assist with tasks that fit their skill level (i.e., workflows, form building, some configuration)

Q75: What training and mentorship strategies should be implemented to support BPHC team members?

A: We would like the vendor to provide support to the BPHC team for any issues/obstacles that arise while performing their assigned development tasks.

Q76: What are the current data sources that need to be migrated?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q77: What is the estimated size of the data requiring migration?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q78: Has a timeline been established for the completion of the process?

A: Desired go live date: June 30, 2025

Q79: What support model will be in place during development and post-implementation?

A: The vendor will be responsible for all development/deployment tasks aside from tasks assigned to the BPHC Power Apps team.

Q80: What is the expected annual data growth in gigabytes (GB) after implementation?

A: Not available at this time.

Q81: We kindly request the BPHC to extend the proposal submission deadline by at least two weeks following the release of response to vendor questions. This extension to the proposal submission deadline will ensure our team has ample time to thoroughly review and comprehend the clarifications provided by BPHC, ensuring that we prepare and submit a comprehensive proposal within the revised timeline.

A: We have extended the proposal submission deadline to February 24, 2025, no later than 5:00 EST.

Q82: What is the approved budget or range allocated for this project?

A: There is no approved budget at this time, vendors should submit their proposal and their estimated line-item cost proposal for each phase of the project.

Q83: We propose implementing a hybrid resource model that strategically leverages a combination of onshore and offshore resources. Our approach entails utilizing offshore resources selectively, while ensuring that critical project communications and primary operational responsibilities will be managed exclusively by onshore resources. We request BPHC to confirm its acceptance of the proposed mix of onshore and offshore resource allocation strategy.

A: BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. Your proposed hybrid model involving offshore resources **does not align** with BPHC's requirement for exclusively **onshore (U.S.-based) resources** to ensure adherence to public-sector security, data residency, and regulatory standards. Please revise your proposal to reflect a fully onshore resource strategy for compliance.

Q84: Does BPHC accept remote resources to work on the project?

A: Yes, BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. *however, BPHC prefers to have all work done within our current time zone (EST).*

Q85: To ensure that bidders fully understand the solicitation documents and requirements, can you please define all acronyms used in the solicitation requirements such as BA, GC, P2P, PD, etc.?

A: CRS-Contract Repository System, BA-Bureau Admin, GC – General Counsel, P2P – Procure to Pay, BD/PD-Bureau Director/Program Director, BPHC-Boston Public Health Commission, SAM-System of Award Management.

Q86: Can you please detail the proposal evaluation criteria by which bidder proposals will be scored (e.g. how will cost, skills, references, experience, etc. be weighted in your evaluation)? Is it a fixed bid or time and material (T&M)?

A: Evaluation criteria would be determined internally by BPHC. BPHC cannot accept Time & Materials (T&M) proposals due to budget constraints and requires a fixed-price turnkey solution to ensure predictable costs. While the internal team's involvement percentage is undetermined, vendors may propose assumptions about role/responsibility splits and include a rate card for reference in supplementary documentation. However, the

proposal must provide a fixed total cost, with potential adjustments discussed post-award once internal capacity is clarified.

Q87: On a scale from 1 to 5 where 1 represents a vendor proximal to you in Massachusetts and 5 represents a vendor in another state, what is your preference for vendor proximity for this project? In other words, please rate your preference for local vendors.

A: There is no preference for local vendors. The preference is for the project to be done remotely within business hours, 9am – 5pm in the Eastern time zone.

Q88: Could you please confirm if any contractor or vendor was involved in the development of this RFP or provided assistance in areas such as initial evaluations, proof of concept, demonstrations, pricing, or any other analyses related to this solicitation?

A: Representatives from Microsoft did a proof-of-concept demo with a model driven app and one other vendor showed a demo using Microsoft Dynamics.

Q89: If so, could you provide further details on their involvement?

A: BPHC submitted very high-level requirements to these groups and asked them to produce a proof-of-concept demo for us. That is the extent of their involvement.

Q90: Is there any incumbent to this?

A: No

Q91: Please provide the name of all contractors and/or vendors if any contractor/vendor assisted with the development of this RFP or provided you with an initial evaluation, proof of concept, demonstration, pricing, or any other analysis related to this solicitation:

Please provide the name of all contractors and/or vendors

A: Microsoft Corporation: Carlos Oquendo Jr - Solution Specialist - Director, Power Platform – State & Local Govt. Ovatiotech via DC Consulting – Peter Carlyle both provided a proof of concept demo.

Q92: Are these contractors and/or vendors eligible to bid on this project?

A: DC Consulting/Ovatiotech is eligible to bid on this project. Their proof of concept demo was for MS Dynamics and we have requested the app be built as a Power Apps Model Driven App.

Q93: What are the expected hours of operations to overlap with BPHC team?

A: 9:00 AM – 5:00 PM Monday – Friday EST

Q94: It was mentioned in the RFP that this model-driven application will be developed in collaboration with BPHCs internal Power Apps team to ensure knowledge transfer and cost optimization. Do you have any preferred engagement model to involve vendor team and BPHCs internal developer.

Generally, IT project development Team comprises of PM, BA, Architect, Developers, QA, UI/UX and Technical writer. Do you have any preferences on the roles which you want to keep for BPHCs internal team?

Or does it mean that you want the vendor to perform the entire development and during closure, you want the vendor to provide knowledge transfer of developed application?

A: BPHC has 2 developers who could potentially help with building forms, workflows and some configuration. We would have to meet to determine what tasks can be assigned to the BPHC development team.

Q95.1: At this stage we cannot determine the percentage of work which will be done by BPHC's internal team. Can we propose the T&M engagement model and share the rate card of roles required for this project?

A. BPHC cannot accept Time & Materials (T&M) proposals due to budget constraints and requires a fixed-price turnkey solution to ensure predictable costs. While the internal team's involvement percentage is undetermined, vendors may propose assumptions about role/responsibility splits and include a rate card for reference in supplementary documentation. However, the proposal must provide a fixed total cost, with potential adjustments discussed post-award once internal capacity is clarified.

Q95: Is there a specific start and completion date for the project? Additionally, is there any event that is influencing the timeline for release or completion?

A: Desired go live date is June 30th 2025. The start date is still to be determined.

Q96: What is the size of BPHCs internal power apps team? Please share the composition BPHCs power apps team (Roles and count)

A: BPHC has a project coordinator and developer, the developer has been working with Power Apps/Automate for 6 months and the Project Coordinator for 5 years. Both team members have adopted BPHC business processes using the Power Platform.

Q97: How many people from the internal power apps team would be aligned for this project?

A: 2 staff

Q98: What is power platform technical competency level of BPHCs internal Power Apps team on Scale of 10.

A: 5 & 3 (Power Apps & Power Automate)

Q99: How many users will access the new Contract Management application?

A: 135 max.

Q100: Will this application be accessed by internal users only?

A: Yes

Q101: What is the expected volume of data (e.g. number of contracts, amendments, etc.) that the system will need to handle per year?

A: Approximately 1200+ contract requests per year.

Q102: Will the new solution be accessed by internal BPHC staff only?

A: Yes

Q103: If not, please provide details related to how external users will interact with the new solution.

A: External users will not access this application at this time.

Q104: Do you need integration with any other BPHC system/ application?

A: The goal will be to integrate with BPHCs Enterprise Resource Planning system. Currently the system uses Microsoft Dynamics Great Plains 2022 and ReQlogic

Q105: Is there any existing contract data that needs to be migrated to the new application?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q106: What is the source and size of data to be imported in the new system?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q107: Are there any specific requirements or constraints for the data migration process?

A: Not that BPHC is currently aware of.

Q108: What security measures are required to protect sensitive contract data (e.g., encryption, access controls)?

A: We use Role-Based Access Control and MFA using Azure Active Directory.

Q109: What Power Platform licensing does BPHC currently have (e.g. Power Apps premium, Power Automate Premium, Dataverse licensing, etc.)?

A: BPHC currently has **Power Automate Premium for Government licenses** in its tenant.

Q110: Are there any specific compliance standards that the system must adhere to?

A: Yes, the system must comply with all applicable federal and Massachusetts state compliance standards, including but not limited to: **201 CMR 17.00** (Massachusetts Data Security Law), **FedRAMP Moderate** for cloud services, **CJIS** (if handling criminal justice data), **HIPAA** (if processing protected health information), and **ADA Section 508** for accessibility. Vendors must also ensure alignment with **Massachusetts Executive Office of Technology Services and Security (EOTSS)** policies and **NIST SP 800-53** security controls. Documentation demonstrating adherence to these standards, including audit readiness and data residency requirements, must be provided as part of the proposal.

Q111: What is the expected volume of data (e.g., number of contracts, amendments) that the system will need to handle in 1 year?

A: Approximately 1200+ contract requests per year.

Q112: We believe you are integrating with SignNow for digital signature. What is the integration model used currently between SignNow and BPHC application in terms of user profile management and sync between the two systems.

A: There is currently no sync between SignNow and our current contract application. Integrating SignNow as part of this project is considered a “nice to have” option at this point.

Q113: Does BPHC have Power Apps premium and Dataverse licenses?

A: All users have PowerApps/Automate licenses that come with the Office 365 license, and we have a few premium licenses for the SQL connector. We have not yet purchased any Dataverse licenses.

Q114: Does BPHCs uses any other Power platform-based solutions?

A: Yes, most of our solutions use Sharepoint lists to store data, Power Apps customized Sharepoint forms and Power Automate workflows to handle the business processes.

Q115: If yes, how many?

A: We estimate 15-20

Q116: Are they developed by internal power apps team or any vendor?

A: BPHC has a Biosafety Permit Site application that was built by a vendor, but the remainder of the solutions were built in house.

Q117: Are you facing any challenges with the existing system which you would like to overcome in the new application?

A: The current system is outdated. The goal is to eliminate 1 or more forms that users currently complete by incorporating it into this new system and we also want to include an approval process workflow.

Q118: Kindly elaborate on the support model required during development.

A: The Power Platform team could assist with building out workflows and forms. The selected vendor to must provide support if the BPHC team runs into obstacles during their development tasks.

Q119: Kindly elaborate on the support required post implementation and its duration.

A: BPHC seeks an optional 90-day post-implementation support package (up to 120 hours on a Time & Materials basis) for tasks like troubleshooting, minor enhancements, user training, and documentation updates. Vendors must detail the scope, hourly rates (via a rate card), and tracking process, pricing this separately from the fixed-cost proposal while adhering to security and accessibility standards.

Q120: Regarding BPHC's internal Power Platform staff: How many people comprise BPHC's internal Power Platform team in total?

A: BPHC has 2 staff members who can provide some development assistance for this project.

Q122: What are the roles and number of resources in each role that will participate in this project?

A: 1. Project Coordinator/Power Platform Developer. 2. Developer.

Q123: On a scale from 1 to 5 where 1 represents "None" and 5 represents "Expert", can you please indicate what Power Platform skills you currently have in house related to:

A: Power Apps/ Power Automate: Project Coordinator / Power Platform Developer – 3. Developer - 2

Model-Driven App Design and Development (i.e. Dataverse Table, Forms, Views, Dashboards, etc.)

A: 1

Power Automate Flow Development

A: 2 & 3

Power Pages Development

A: 1

Power BI

A: 1

Q124: Regarding other BPHC Power platform-based solutions: What other Power platform-based solutions are currently in use by BPHC?

A: BPHC has numerous small processes used by our HR and Operations Programs (Residency and Flu verifications, Fleet Management, Parking Lot Waiting list).

BPHC has a secure Biosafety Permitting site built with Sharepoint Online, utilizes the Power Apps/Automate to handle forms and business processes and is accessible to external guest users.

BPHC's current Contact Management app is built with Sharepoint Online, Power App & Power Automate. We use the same basic processes to manage Tech Requests, Video Surveillance Camera requests, and we are currently building out an onboarding process for new staff.

BPHC has also built a canvas app to track STI and pregnancy testing, sexual aid materials distribution and health related class schedules for high school students.

BPHC has also built an application to monitor attendance and services for Boston's homeless population who reside in six local shelters

Q125: Were these applications developed by the internal Power Platform team or an external vendor(s)? If the latter, please provide details about any such external vendors including the name, projects delivered, eligibility to bid on this solicitation, etc.

A: The Biosafety Permit Site was built by KGC Solutions, an external vendor however they will not be bidding on this project. All other processes were built in house.

Q126: Does the scope of work for this solicitation include system integration and if so: What systems (manufacture, product name, version, etc.) does the solution need to be integrated with?

A: The goal will be to integrate with BPHC's Enterprise Resource Planning system. Currently the system used are Microsoft Dynamics Great Plains 2022 and ReQlogic

Q127: Do these systems have APIs that can be used to implement the required integration

A: Not currently

Q128: What level of integration is anticipated (e.g. hyperlinks only, document-level integration, unidirectional/read only, bidirectional data updates, functional integration)?

A: Not known at this time, can discuss with the selected vendor.

Q129: Given the myriad unknowns related to this requirement, is it acceptable to estimate time for requirements development and analysis to produce an estimate for the implementation in our proposal vs. an estimate for the actual software and implementation?

BPHC requires a **fixed-price turnkey proposal** for the full software implementation, including both requirements analysis and development. While unknowns exist, vendors must leverage the provided documentation (Visio diagrams, data dictionary, use case/approval workflows) to formulate a comprehensive, fixed-cost proposal.

If critical gaps remain, vendors may:

1. **Embed assumptions** in their proposal (e.g., scope boundaries, dependencies on BPHC's inputs) to define the basis for their estimate.

2. Propose a **phased approach** with a fixed price for the initial requirements/analysis phase, followed by a fixed-cost implementation phase once unknowns are resolved.

However, BPHC will not accept bifurcated Time & Materials (T&M) estimates for analysis/implementation. Final proposals must reflect a turnkey commitment, with adjustments negotiated post-award if scope changes arise. Clarify risks or dependencies in your submission to ensure alignment with BPHC's budget and delivery expectations.

Q130: Can we assume that SignNow supports seamless integration with the Microsoft Power Platform via APIs or Power Automate Connectors to support all e-signature requirements?

A. That cannot be assumed.

Q131: Regarding the requirement stated as "Current data and files must be imported into the new system": How many files exist that need to be imported into the new solution?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q132: What is the total size in GB/TB of the files to be imported into the new solution?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q133: What is the total size in GB/TB of the data to be imported into the new solution?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q134: Regarding the requirement stated as "send to Grants for approval": Do "Grants" refer to a group of people that will have access to the new system such that "send" can be interpreted to mean assign?

A: "Send to Grants for Approval" is a status that will trigger an email to notify grants to review and approve the request. Grants staff will have access to this system.

Q135: If not, what is "Grants" in this context (e.g. an email distribution list, another application, etc.) and how is a request/record sent to them/it (e.g. email, via an API provided by another system, etc.)?

A: Notifications will be sent to grants@bphc.org by the workflow.

Q136: Approximately how many forms need to be created as part of the implementation of the new Model-Driven App?

A: We estimate 3-5 forms will be required.

Q137: What integration method is currently used between signNow and existing BPHC applications in terms of user profile management and sync between the two systems?

A: SignNow is not integrated with the current system, that part of the process is done manually.

Q138: Can you provide more details on the expected architecture for the Power Apps solution? Are there any existing components or integrations that need to be considered? ERP, financial, document management, or CRM)? If so, what are the integration points and preferred methods (APIs, connectors, etc.)?

A: Not at this time.

Q139: What is the expected user base (internal vs. external users), and how many users will be interacting with the system concurrently?

A: Only internal users will access this application.

Q140: Is there a preference for using Power Apps Dataverse, SharePoint, or another data storage solution for managing contracts and related files?

A: BPHC wants this solution to use Dataverse for data storage however, we are open to hearing other possible options.

Q141: What security and compliance standards must be followed for data storage and user access?

A: Vendors must adhere to the following security and compliance standards for data storage and user access:

1. **Third-Party Standards:** Compliance with **HIPAA** (health data), **Federal Tax Information (FTI)** protocols, and **PCI DSS** (payment card data), including encryption, access controls, and audit mechanisms for stored data and user permissions.
2. **Breach Notification:** Immediate reporting of security breaches (e.g., unauthorized access or data exposure) to BPHC via contractually defined procedures.
3. **Legal & Contractual Obligations:** Adherence to federal regulations (e.g., IRS rules for FTI), Massachusetts laws (e.g., 201 CMR 17.00 for data protection), and industry standards, with contractual language explicitly outlining the vendor's responsibilities for secure storage, role-based access, and compliance documentation.

Vendors must detail their adherence to these standards in proposals, including technical safeguards (encryption, authentication) and administrative processes (audits, training).

Q142: Will the application require role-based access control (RBAC)? If so, what roles and permissions need to be implemented?

A: P2P Admin – Contribute/Edit, Submitters/Approvers – Contribute, All staff – Read Only.

Q143: Are there specific workflow automation or approval processes that must be built within the application?

A: All workflows were included in the requirements document.

Q144: What is the skill level of the internal BPHC Power Apps team? Will they need training on advanced topics like Power Automate, Power BI, or Dataverse?

A: BPHC Power Apps team are intermediately proficient in building out Power Apps forms and workflows with Power Automate.

Q145: How is the knowledge transfer expected to take place? (e.g., documentation, training sessions, shadowing, co-development)

A: Along with co-development and depending on complexity, knowledge transfer may require overview meetings between the vendor and BPHC. Any needed documentation will be created by BPHC however we would like vendors to include a line item for system documentation in their proposal.

Q146: How much of the development is expected to be completed by the BPHC team versus the selected vendor?

A: This will need to be determined. Ideally the BPHC team can assist with form building and workflows.

Q147: What format is the current contract data stored in (e.g., databases, SharePoint, Excel, PDF, other document repositories)?

A: A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q148: Are there any data cleansing or transformation requirements before importing data into the new system? Should the system include functionality for archiving or automatically purging data after seven years, or will that be managed separately?

A: There will be some required data cleaning/management of import data.

Q149: How large is the dataset to be migrated, and are there any specific compliance requirements regarding historical contract data?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size.

Q150: What is the expected timeline for project completion, including development, testing, and deployment?

A: The desired go live date is June 30th 2025. BPHC would like to see the vendors proposed timeline.

Q151: Are there key milestones or deliverables that need to be met within specific timeframes?

A: Not at present.

Q152: Is there any budget consideration from BPHC

A: No approved budget at this time, vendors should submit their proposal and their estimated line-item cost proposal for each phase of the project.

Q153: Will the vendor be responsible for post-implementation support and maintenance? If so, for how long?

A: BPHC seeks an optional 90-day post-implementation support package (up to 120 hours on a Time & Materials basis) for tasks like troubleshooting, minor enhancements, user training, and documentation updates. Vendors must detail the scope, hourly rates (via a rate card), and tracking process, pricing this separately from the fixed-cost proposal while adhering to security and accessibility standards.

Q154: Are there any Service Level Agreements (SLAs) expected for ongoing support?

A: Not at this time.

Q155: Is it allowed to use offshore/nearshore resources for this project.

*A. A: BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. Your proposed hybrid model involving offshore resources **does not align** with BPHC's requirement for exclusively **onshore (U.S.-based) resources** to ensure adherence to public-sector security, data residency, and regulatory standards. Please revise your proposal to reflect a fully onshore resource strategy for compliance.*

Q156: Could BPHC please confirm whether the Use Case, Approval, and Business Process Documentation are part of the post-award process?

A: To be determined

Q157: Is there specific training or documentation provided for users to understand how to access and navigate the new CRS application?

A: BPHC will handle this however, we would like vendors to add a line item for system documentation in their proposal.

Q158: Can users be notified automatically when their request is approaching the 7-day limit for submission, to ensure that the request is not canceled?

A: Not a requirement at the moment but we may want to include it.

Q159: Should vendors follow the process outlined in the Use Case, Approval, and Business Process Documentation at the time of the bid?

A: BPHC would like vendors to follow all documentation provided to submit their proposal however, other development suggestion may also be considered.

Q160: Should vendors add the Use Case, Approval, and Business Process Documentation to the submission? If so what kind of information should vendors add?

A: BPHC would like vendors to follow all documentation provided to submit their proposal however, other development suggestion may also be considered.

Q161: Should vendors add any specific section of the Use Case, Approval, and Business Process Documentation to the submission? If so which section?

A: BPHC would like vendors to follow all documentation provided to submit their proposal, however other development suggestions may also be considered.

Q162: Is the DM9556_280_64_Attachment_5_CRS_Data_Dictionary purely informational, or should vendors include it in their proposal response?

A: Based on how this question was presented, we believe this document is informational.

Q164: Are there scores for the evaluation criteria?

A: Yes

Q165: Is there any SBE/MBE/WBE goal for this solicitation?

A: They are encouraged to apply.

Q166: Is there any incumbent to this solicitation?

A: No

Q167: What is the estimated budget for the contract?

A: No approved budget at this time, vendors should submit their proposal and their estimated line-item cost proposal for each phase of the project.

Q168: Is this a new contract or an existing contract?

A: New

Q169: Could the BPHC please confirm the required forms that must be submitted with the proposal?

A: Proposal, budget, organization qualification & references.

Q170: Do vendors have to provide references within our response? If yes, how many?

A: Yes. 3 references.

Q171: Could BPHC please grant an extension on the due date?

A: Proposal due date has been changed to February 24, 2025.

Q172: Does BPHC accept remote resources to work on this engagement?

A: Remote resources are acceptable however BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies and prefers to have all work done within our current time zone (EST).

Q173: Does BPHC accept offshore resources to work on this engagement?

A: BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. Your proposed hybrid model involving offshore resources **does not align** with BPHC's requirement for exclusively **onshore (U.S.-based) resources** to ensure adherence to public-sector security, data residency, and regulatory standards. Please revise your proposal to reflect a fully onshore resource strategy for compliance.

Q174: Does BPHC prefer on-site resources to execute this engagement?

A: The BPHC preference is for remote resources however, BPHC prefers to have all work done within our current time zone (EST).

Q175: If the resources we provide at the time of proposal submission are not available at the time of a potential contract, could vendors replace them with equally qualified resources?

A: BPHC would like to make that determination on a case-by-case basis.

Q176: In case firms are submitting confidential information in the response, is it required to provide a redacted version?

A: No

Q177: Could the BPHC kindly clarify the exact number of attached files needed for the response?

A: Proposal, budget, organization qualification & references. It's preferred to have the files in 1 pdf.

Q178: Could the BPHC please clarify if firms can utilize subcontractors to meet the requirements of this opportunity?

A: Yes, as long as it is fully disclosed in the proposal and budget.

Q179: Could the BPHC please clarify if subcontractor references are allowed to be used for the services provided?

A: No

Q180: Could the BPHC please confirm what is the suggested font size and type for the proposal?

A: Suggested Font Family – Calibri; Font size 11.

Q181: Are commercial references allowed?

A: Yes

Q182: Should vendors provide a pricing or cost proposal? If so, is there a specific template they must follow?

A: No specific template. Vendors should submit their proposal and their estimated line-item cost proposal for each phase of the project.

Q183: Could the BPHC please clarify if they are looking for COTS or a custom-built solution?

A: We are looking for a custom-built solution.

Q184: Could the BPHC kindly provide a proposal format?

A: Vendors can provide their own proposal format and submit as 1 PDF document.

Q185: Are vendors required to provide references? If yes, then how many?

A: At the most 3 references.

Q186: If vendors are required to provide references, can they be from commercial firms and ongoing projects?

A: Yes.

Q187: Are vendors allowed to add a cover letter or an executive summary for a brief background of the firm?

A: Yes.

Q188: Under resource allocation plan, are vendors supposed to add resumes of the key team who will be assigned to finish this project?

A: Yes.

Q189: Are vendors supposed to make a proposal as they see fit or is there a format that they can follow?

A: Vendors can make a proposal as they see fit however please submit proposals as 1 PDF document.

Q190: Could BPHC please provide a checklist so that vendors can add all the important information required for evaluation?

A: Required information will be Proposal, budget, organization qualification and 3 references.

Q191: Is there an evaluation criteria?

A: Determined internally with BPHC.

Q192: Are vendors required to add their previous experience regarding the scope of work requested?

A: IT is recommended that vendors add their prior experience in the proposal.

Q193: Can firms add case studies to showcase their experience? If yes, then in which section?

A: Yes, add as an attachment.

Q194: Is there a page limit for the RFQ response?

A: Yes, there is a 5-page limit including Proposal, budget, and organization.

Q195: Considering that this is an RFQ, can vendors provide a brief summary about themselves to help the evaluators understand the firm?

A: Yes

Q196: Is it mandatory for firms to have healthcare experience prior to submitting this bid?

A: No

Q197: Is there any local preference for Boston or Massachusetts firms?

A: No

Q198: Is it mandatory for firms to have government/public experience?

A: No

Q200: Is there any evaluation factor that may deem a vendor non-responsive if not followed?

A: BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. Your proposed hybrid model involving offshore resources **does not align** with BPHC's requirement for exclusively **onshore (U.S.-based) resources** to ensure adherence to public-sector security, data residency, and regulatory standards. Please revise your proposal to reflect a fully onshore resource strategy for compliance.

Vendors must hold a minimum of **Microsoft Certified Gold Partner** status, possess at least **4 years of proven experience** with Microsoft Power Platform, and demonstrate **5+ years of engagement with public agencies** (e.g., government or public-sector organizations) to ensure technical expertise, platform proficiency, and familiarity with public-sector operational requirements.

Q201: Place of Performance: Does your organization support remote work for vendor resources? Are there any specific requirements for on-site visits that should be considered during the project?

A: Remote work is the preference. BPHC, as a public agency, requires **all resources to be based in the U.S.** and does not permit offshore resource engagement, per its operational and compliance policies. Your proposed hybrid model involving offshore resources **does not align** with BPHC's requirement for exclusively **onshore (U.S.-based) resources** to ensure adherence to public-sector security, data residency, and regulatory standards. Please revise your proposal to reflect a fully onshore resource strategy for compliance.

This project does not require on-site visits however, BPHC prefers to have all work done within our current time zone (EST).

Q202: Office365 Usage: Is your organization currently utilizing Office365? If so, will this play a role in the Power Apps implementation, such as integration with other Office365 tools?

A: Yes BPHC currently utilizes Office 365 however, we do not believe it will play a role in the Power Apps implementation.

Q203: Incumbent Vendor: Is there an incumbent vendor who assisted in drafting this RFP? If so, are they permitted to bid on this project?

A: No, there is no incumbent vendor.

Q204: Existing System: Is there an existing system in place that this Power Apps solution will replace? If so, is this project considered a rebuild of the current system?

A: Yes, the current system in place is Sharepoint. The goal is to implant a new Contract Management System.

Q205: Minimal Viable Product (MVP): Do you have a clear concept of an MVP for this project? Are you comfortable with delivering an MVP first, followed by subsequent releases to enhance the system?

A: BPHC expects vendors to meet the expectations of the requirements provided.

Q206: Power Apps Preference: Do you have a preference for using Model-Driven Power Apps or Canvas Apps for this project?

A: Preference is for a Model Driven Power App.

Q207: Data Migration: How much data will need to be migrated and from which system(s)? (e.x., Excel) Do you have a preference for storing data in Dataverse or SQL?

A: Contract (CRS) data is stored in a Sharepoint list that is approximately 50 GB in size. The attachments make up almost 100% of the total list size. The data storage preference is to use Dataverse.

Q208: Training Requirements: What is your preferred training method for the new system? Options include: Onsite instructor-led training, Virtual instructor-led training, Recorded video sessions

A: To be determined after the BPHC team review proposals.

Q209: Load Requirements: What are the expected load requirements for the new system, including the number of users and transaction volumes?

A: The project anticipates 135+ users, and 120+ transactions per month.

Q210: System Integrations: Will there be any integrations required with other systems?

A: The goal will be to integrate with BPHCs Enterprise Resource Planning system. Currently the system used are Microsoft Dynamics Great Plains 2022 and ReQlogic

Q211: User Authentication: How will user authentication and access control be managed? Should users log in using existing Active Directory (Azure AD) credentials with multi-factor authentication, or will there be external users as well?

A: Internal Azure AD users only.

Q212: Known Risks: Are there any known risks or challenges associated with this project that should be addressed in the proposal?

A: Not at this time.

Q213: Reporting: What tool is currently used for report generation?

A: Excel is used after extracting the data from Microsoft 365 Sharepoint system.

Q214: Besides the general report generation capability, are there any specific reports required for this project? If so, how many?

A: Reporting capability suggestions are welcomed.

Q215: Cost Breakdown: Should this project be quoted as fixed price or time and materials?

A. BPHC cannot accept Time & Materials (T&M) proposals due to budget constraints and requires a fixed-price turnkey solution to ensure predictable costs. While the internal team's involvement percentage is undetermined, vendors may propose assumptions about role/responsibility splits and include a rate card for reference in supplementary documentation. However, the proposal must provide a fixed total cost, with potential adjustments discussed post-award once internal capacity is clarified.

Q215: If our firm is the awarded vendor for this project, what type of payment schedule does BPHC use?

A. BPHC utilizes a **milestone-based payment schedule** where vendors invoice upon successful completion of predefined project milestones. After a milestone is achieved and approved by BPHC, the vendor submits an invoice, which is typically processed and paid within **a few weeks**. Specific milestone deliverables, approval workflows, and payment timelines will be formalized in the contract. Vendors should ensure proposals align with this structure to accommodate BPHC's procurement and budgetary processes.