



**Request for Proposal  
Questions and  
Responses**

**RFP ITS-008-25 for Microsoft Dynamics 365 CRM for Student Engagement**

**Q1.** The RFP suggests that the Initiate phase is complete, and as the vendor, we will handle the Implement, Prepare, and Operate phases. Is there an estimated effort or total story points available to help with resource allocation per sprint?

**A:** Thank you for your inquiry. BPHC does not provide predefined effort estimates or story points for the Implement, Prepare, or Operate phases outlined in the RFP. These phases are intentionally left for vendors to define based on their proposed methodology, expertise, and understanding of the project scope.

BPHC expects vendors to conduct their own analysis of the requirements, deliverables, and success criteria detailed in the RFP and propose a resource allocation strategy (including sprint planning and story points) that aligns with their approach to achieving the project's objectives. We encourage vendors to outline their agile implementation framework, including how they plan to size tasks, allocate resources, and manage sprints to meet the timeline and outcomes defined in the RFP. If your proposal includes a discovery phase to refine estimates, ensure this is explicitly detailed in your submission.

**Guidance for Compliance:**

- Emphasize flexibility and transparency in your sprint planning.
- Align your effort estimates with the deliverables of the RFP (cite specific sections).
- Highlight prior experience with similar CRM implementations in the education/public sector to strengthen your resource allocation rationale.

BPHC will evaluate proposals based on the vendor's ability to demonstrate a clear, realistic, and efficient plan for execution. Let us know if additional scope-specific clarifications would assist your team.

**Q2.** Are Canadian resources working in Eastern Time (ET) considered local? Additionally, can offshore resources from the Offshore GDC (outside North America) be utilized?

**A:** BPHC prefers to utilize US-based resources for this project.

**Q3.** The CHEC states that the standard workday for the vendor team is 9 AM – 5 PM, Monday through Friday, in the local time zone of the team. With an offshore team,



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maintaining this schedule may be challenging. Would you be open to our team working extended hours outside of this window?

A: The Boston Public Health Commission (BPHC) requires all vendor team members assigned to this project to be based in the United States and to work exclusively within the Eastern Standard Time (EST) zone. Per the terms of the RFP and the CHEC guidelines, the vendor team's core working hours must align with BPHC's standard operational schedule of **9:00 AM – 5:00 PM EST, Monday through Friday**, to ensure real-time collaboration, meetings, and adherence to project timelines.

Q4. Will CHEC cap billable hours per team member at 8 hours per day, or will additional hours be permitted for overlap?

A: The Boston Public Health Commission (BPHC) is procuring a turnkey solution, meaning the vendor assumes full responsibility for delivering the defined scope, timeline, and outcomes per the RFP. BPHC does not prescribe or cap the daily billable hours for vendor staff, as the turnkey model prioritizes deliverables over hourly tracking. However, all work must comply with the following:

**Core Availability Requirement:** Vendor teams must be available for collaboration, meetings, and issue resolution during the **mandatory core hours of 9:00 AM – 5:00 PM EST, Monday through Friday**, as outlined in the CHEC guidelines.

**Contract Structure:**

- a. For **fixed-price contracts**, vendors are expected to manage their team's effort and hours internally to meet deliverables within the agreed budget.

Q5. The RFP states that all project resources will receive the necessary security access. Could you clarify the specific type of security access BPHC is referring to?

A. BPHC defines "security access" as role-based permissions to designated data systems and applications, provisioned through BPHC-issued credentials (e.g., secure logins). This includes access necessary to fulfill project tasks, such as development environments, databases, or collaboration tools, aligned with the principle of least privilege. All access will adhere to BPHC's cybersecurity policies (CIS/NIST frameworks), including multi-factor authentication, audit trails, and data encryption. Vendors must confirm their ability to comply with these standards and detail their



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approach to managing access in their proposal. Specific requirements are outlined in the RFP

Q6. The SOW notes that holidays, vacation, and training time have not been factored in. Can these be determined at the project's onset?

A: BPHC expects the vendor to proactively manage resource availability (holidays, vacations, training) to ensure adherence to the project timeline outlined in the SOW. While these factors are not pre-budgeted, vendors must account for them internally without impacting deliverables or deadlines. Any proposed adjustments to the schedule due to resource unavailability require prior written approval from BPHC. Proposals should detail the vendor's approach to mitigating schedule risks associated with non-project time, per the requirements in RFP.

Q7. Could you clarify the requirement for client compliance training and why it is excluded from the estimation?

A: BPHC requires client compliance training to ensure all vendor personnel adhere to applicable laws, policies (e.g., data security, HIPAA), and BPHC-specific protocols. This training is excluded from project estimations because it is a mandatory prerequisite for vendor staff prior to engaging in project work, not a billable project task. Vendors must confirm in their proposal that their team will complete BPHC-mandated training *at their own cost and time* without impacting deliverables or timelines. Compliance expectations are detailed in RFP, and proposals should outline how training will be managed proactively.

Q8. Do the supervisor need to sign the documents in the power pages or they should sign it in the Sign Now App?

A: BPHC requires all document signatures to comply with the protocols outlined in the RFP. Supervisors must sign documents using the **Sign Now App** (or BPHC's designated e-signature tool) to ensure auditability, security, and adherence to standardized workflows. Power Pages may be used for data entry or form access, but final approvals must follow the secure, traceable method specified in the RFP. Proposals must confirm the vendor's ability to integrate with BPHC's approved signing tools without deviation unless explicitly authorized in writing.

Q9. In Conceptual representation, it have mentioned about Exchange Online, please can you inform as what purpose it will be used in project.



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A: Exchange Online will be used to facilitate secure, centralized email communication, calendaring, and collaboration across project stakeholders in alignment with BPHC's Microsoft 365 environment. Its integration ensures compliance with data security standards (e.g., HIPAA, CIS/NIST) and seamless synchronization with other project tools (e.g., Dynamics 365). All vendor interactions must adhere to BPHC's configured policies for encryption, retention, and access control. Specific use cases are detailed in RFP; proposals should confirm compatibility with Exchange Online workflows outlined therein.

Q10. What role-based access restrictions should be implemented for different user groups (students, CHWs, admins)?

A. Role-based access restrictions must align with the principle of least privilege and BPHC's cybersecurity policies. **Students** should have read-only access to designated educational resources; **Community Health Workers (CHWs)** require edit access to case management tools and patient data (within HIPAA-compliant boundaries); **Admins** need full system access for configuration, user management, and audits. All roles must enforce multi-factor authentication, activity logging, and data encryption. Specific permissions are detailed in RFP; vendors must propose a RBAC framework ensuring segregation of duties, regular access reviews, and compliance with HIPAA/FERPA where applicable.

Q11. Is there a fixed go-live date, or is the timeline flexible based on project scope?

A: BPHC has set a **fixed go-live target of December 2025** to align with strategic priorities. While the timeline is non-negotiable, vendors may propose phased rollouts or parallel workflows to meet this deadline, provided core deliverables are achieved on schedule. Proposals must demonstrate a clear, risk-mitigated plan to adhere to this timeline, with any dependencies or scope adjustments requiring prior BPHC approval. Flexibility in execution is permissible only if it does not compromise the final launch date. Refer to RFP for milestone expectations and for governance protocols.

Q12. Is there any eligibility criteria or Qualifications requirement. If yes, kindly provide the details.

A: BPHC requires vendors to meet eligibility criteria and qualifications outlined in the



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RFP, including demonstrated experience in public-sector CRM implementations (e.g., education/Public sector/healthcare), compliance with cybersecurity standards (e.g., NIST/CIS), and valid certifications (e.g., Microsoft Dynamics 365). Specific requirements, such as proof of U.S.-based teams, adherence to HIPAA/FERPA, and prior success with comparable projects. Proposals must affirm compliance with these criteria and provide supporting documentation. Failure to meet stated qualifications will result in disqualification.

**Q13. What specific business processes should be automated within Dynamics 365 CRM beyond student engagement?**

**A:** BPHC seeks automation of **case management workflows, compliance tracking (e.g., HIPAA/FERPA), grant/funding reporting, stakeholder communication (e.g., providers, partners), and service request resolution** within Dynamics 365 CRM. These processes must align with public health sector standards, integrate with existing systems (e.g., Microsoft 365), and enable real-time data visibility for decision-making. Proposals should prioritize scalability, auditability, and seamless alignment with BPHC's operational frameworks outlined in the RFP. Vendors must detail how their solution will streamline these workflows while maintaining strict security protocols (NIST/CIS) and role-based access controls.

**Q14. Since data migration is out of scope for large datasets (over 10,000 records), how will historical data be accessed?**

**A:** BPHC's data migration scope is limited to the current Excel dataset (under 10,000 records), for which the vendor must provide guidance and tools to ensure seamless transfer to the new system. Historical data exceeding this threshold will remain in legacy systems and can be accessed via read-only archives or existing interfaces, as migration of large datasets is excluded per RFP. Proposals must confirm the vendor's ability to support small-scale Excel migration while ensuring the new system integrates with BPHC's archival solutions for historical data retrieval, maintaining compliance with data governance protocols (e.g., encryption, access controls) outlined in RFP.



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Q15. To ensure our proposal remains within the financial expectations of BPHC, could you provide any guidance on the funding allocated for this initiative?

A: BPHC has not formally allocated a predefined budget for this initiative but expects proposals to align with a cost ceiling of **\$200,000** while delivering full scope compliance. Vendors must submit competitive, value-driven solutions that prioritize efficiency, scalability, and adherence to the RFP's technical and operational requirements. Proposals should transparently justify costs and demonstrate how deliverables will be achieved within this financial expectation. For guidance, refer to RFP Section [X] (cost structure) and Exhibit [Y] (scope priorities). BPHC will evaluate bids based on cost-effectiveness, innovation, and alignment with project goals.

Q16. Does BPHC have preference for local vendors or underrepresented business enterprises (MBE, WBE, etc.)?

A: As part of BPHC's efforts to have an equitable procurement process, BPHC encourages the participation of Supplier Diversity Office of Commonwealth of Massachusetts Certified Underrepresented Businesses Enterprise (CUBE) businesses, which 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.

Q17. How many users will need access to Dynamics 365, and what are the expected user roles?

A: BPHC anticipates approximately **150 users** requiring access to Dynamics 365 CRM, encompassing roles such as **administrators** (full system control), **case managers/CHWs** (edit access to client records), **analysts** (read-only/reporting), and **external partners** (limited, role-specific permissions). Exact roles and access tiers are defined in **RFP** which mandates adherence to the principle of least privilege, multi-factor authentication, and audit trails. Proposals must outline how user roles will align with BPHC's operational workflows and security policies (e.g., HIPAA,



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NIST/CIS), ensuring scalability for future needs.

Q18. Can you confirm if vendors are required to include a detailed cost estimation as part of the proposal submission? If so, what are the components expected in it.

A: Yes, vendors must include a **detailed cost estimation** in their proposal, structured to reflect a fixed-price or time-and-materials model. Required components include:

- **Labor costs** (roles, rates, hours);
- **Third-party integrations** (e.g., Microsoft 365, data migration tools);
- **Contingency/risk mitigation** (scope adjustments, delays);
- **Training/support** (post-launch);
- **Compliance costs** (security audits, policy alignment).

Estimates must align with BPHC's stated financial expectations and explicitly justify value-for-money. Proposals lacking itemized transparency will be deemed non-compliant.

Q19. Is there a current vendor providing similar Dynamics 365 CRM services for BPHC, or is this a new implementation?

A: No.

Q20. If an incumbent vendor exists, are they eligible to re-bid for this contract?

A: NA

Q21. To ensure compliance with submission requirements, can you confirm if there are any specific formatting preferences or a recommended page limit for the proposal?

A: Yes, proposals must adhere to the formatting and submission guidelines outlined in RFP, a recommended page limit of 5-6(exclusive of appendices), and file format (e.g., PDF). Proposals exceeding the page limit or deviating from formatting standards without prior written approval will be deemed non-compliant. Key components (e.g., Technical Approach, Cost Breakdown, Compliance Attestations) must follow the structure defined in the RFP. For clarity, review the RFP for templates and submission





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checklists.

Q22. Will the vendor be provided with administrative or appropriate user-level access to the licensed Dynamics 365 and Azure environments for configuration and testing?

A: BPHC will provide an Azure subscription and will provide the Vendor with administrative control to build the development and test environments.

Q23. Beyond the licenses mentioned in the RFP, does BPHC anticipate any additional licensing needs (e.g., Power BI, Power Automate, AI Builder) that should be accounted for in the solution design?

A: BPHC has secured all core Microsoft licenses (e.g., Dynamics 365, Power BI, Power Automate) required for this project. Vendors must design solutions using these existing licenses unless proposing new tools (e.g., AI Builder), which must be explicitly justified, pre-approved in writing, and funded by the vendor. Proposals should confirm alignment with BPHC's current licensing framework (detailed in **RFP**) and avoid assumptions about additional licensing.

Q24. Could you please provide the total count of student, student supervisor and BPHC Admins.

A: BPHC confirms an anticipated total of **150 users** across roles, including students, student supervisors, and BPHC admins/staff. Specific counts per role are not pre-defined, as this may evolve based on program needs. Vendors should propose a scalable solution that accommodates flexible role distribution while adhering to the access controls, security protocols (e.g., HIPAA/NIST), and user management workflows detailed in **RFP**. Proposals must outline assumptions and justify resource allocation based on the roles defined in the RFP.

Q25. Is there is a specific proposal format or template that you would prefer bidders to follow?

A: Yes, proposals must strictly follow the **formatting template and structure** provided in the RFP, which includes sections for technical approach, cost breakdown, compliance attestations, and references. Adherence to the specified font, margins,





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page limits (e.g., pages for the core proposal), and file format (PDF) is mandatory. Proposals deviating from the template without prior written approval will be deemed non-compliant. Review the RFP for submission guidelines and ensure all required appendices (e.g., certifications, work samples) are included.

Q26. Has this RFP been fully prepared by BPHC or has an outside consultant provided content?

A: BPHC collaborated with **Microsoft Professional Services** to develop technical components of this RFP, ensuring alignment with Dynamics 365 best practices and public-sector requirements. However, BPHC retains full ownership of the RFP's scope, objectives, and evaluation criteria. Vendors must respond solely to the requirements and deliverables outlined in the document, independent of its development process.

Q27. If an outside consultant, will they be able to respond to the RFP with a solution.

A: No

Q28. There are specifications for offshore development work. Is Off Shore required or can all USA based resources be used.

A: Yes, US based resources are required. BPHC has restrictions on using resources located outside the US, including Canada and India.

Q29. How many users will be utilizing the solution?

A: BPHC anticipates approximately **150 total users** utilizing the solution, including students, student supervisors, and BPHC administrators/staff. While exact role distribution may evolve, the system must support this user base with scalable role-based access controls, security protocols (e.g., HIPAA/NIST), and performance standards outlined in **RFP**.

Q30. How many students would be managed by the solution?

A: BPHC anticipates approximately **80 to 100 students** will be managed by the solution, with potential variability based on program enrollment. The system must support this scale while ensuring role-based access controls, data security (e.g.,



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HIPAA/FERPA compliance), and seamless integration with workflows for supervisors and administrators. Proposals should design for scalability to accommodate minor fluctuations in student numbers, as outlined in **RFP** and confirm alignment with BPHC's user management and technical requirements.

**Q31. What are the evaluation criteria and scoring?**

**A:** Proposals will be evaluated based on criteria including **technical approach (40%)**, **cost-effectiveness (30%)**, **compliance with security/operational requirements (20%)**, and **vendor experience/references (10%)**, as detailed in **RFP**. Scoring prioritizes alignment with BPHC's strategic objectives, adherence to public-sector standards (e.g., HIPAA/NIST), and demonstrated ability to deliver within the \$200,000 ceiling and December 2025 timeline. Proposals must strictly follow submission guidelines and address all requirements to avoid disqualification. Review the RFP's evaluation framework for granular scoring metrics.