

Jhpiego Microsoft Dynamics Support

Request for Proposal

July 2021

**Note:** This document contains Jhpiego Business Confidential Information and shall not be distributed outside of your organization without the prior written consent of Jhpiego

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Table of Contents

[Introduction 3](#_Toc496788291)

[Jhpiego 3](#_Toc496788292)

[Schedule 4](#_Toc496788293)

[Contact Details 4](#_Toc496788294)

[Locations 4](#_Toc496788295)

[Scope of Work 5](#_Toc496788296)

[Evaluation Criteria 5](#_Toc496788297)

[Directions for Response 5](#_Toc496788298)

[Questions From Bidders 7](#_Toc496788299)

[Proposal Validity 7](#_Toc496788300)

[Award of Contract 7](#_Toc496788301)

[Contract Terms 8](#_Toc496788302)

Introduction

Through this Request for Proposal, Jhpiego intends to engage with a Microsoft Solutions Partner and establish a master services agreement to support Jhpiego’s CRM Dynamics instance. It is our intention to establish a one-year contract with two option years. The selected partner will work with Jhpiego’s New Program Development (NPD) team and will be responsible for responding to requests for customizations, troubleshooting, preparing for and implementing updates, and providing technical support and other maintenance, as needed, for our cloud instance.

The engagement will be dependent on the vendor’s ability to provide services that meet the requirements outlined in the Scope of Work and the most competitive price. Although Jhpiego is entering into this RFP process with the intention of evaluating suppliers and possibly purchasing services from a supplier, this document in no way commits Jhpiego to make any purchase, or make any other legal commitment to enter into a business relationship with any bidder. Jhpiego thanks you for your participation in this RFP process and looks forward to learning more about your organization.

Jhpiego

Jhpiego (pronounced "ja-pie-go"), is an international non-profit health organization affiliated with the Johns Hopkins University.

For almost 50 years and in over 155 countries, Jhpiego has empowered front-line health workers by designing and implementing effective, low-cost, hands-on solutions to strengthen the delivery of health care services for women and their families. By putting evidence-based health innovations into everyday practice, Jhpiego works to break down barriers to high-quality health care for the world’s most vulnerable populations. Jhpiego’s focus is on training and support for health care providers-including doctors, nurses, midwives and health educators working in limited-resource settings throughout Africa, Asia, the Middle East, Latin America and the Caribbean.

Jhpiego’s program management strategy recognizes the technical complexity and geographical, cultural, socio-economic and political diversity among our programs. We develop global program initiatives and technical interventions that can be adapted for country-specific applications. In support of this field-driven philosophy, Jhpiego uses a decentralized organizational structure that consists of a global "delivery system" designed to implement the entire portfolio of Jhpiego awards with assistance from key technical, programmatic and administrative staff.

Schedule

The following is the planned schedule for this RFP process. All dates are listed in the local time for Baltimore, MD, USA (EDT - UTC/GMT-5). We will update you if circumstances dictate a change to this schedule.

* Distribution of the RFP: **July 19, 2021 / 9:00 a.m.**
* Bidder Questions Due: **July 27, 2021 / 5:00 p.m.**
* Answers to Questions Published: **July 30, 2021 / 5:00 p.m.**
* Proposals Due: **August 16, 2021 / 5:00 p.m.**
* **Note:** Failure to comply with any of the above deadlines will be interpreted as your intention to not participate in this RFP

Contact Details

Please direct all questions and RFP responses to the following primary contact:

**Julia Krieger**

Julia.Krieger@jhpiego.org

**NOTE:** All formal responses and questions must be submitted **by email** to the contact listed above. Questions will not be answered over the phone.

Locations

Jhpiego’s headquarters is located at the below address, from where this effort will be managed:

1615 Thames Street

Baltimore, MD 21231, USA

Scope of Work

Jhpiego is looking for a Microsoft-certified Dynamics CRM partner to establish as a preferred services provider under a 3-year agreement. The provider shall identify a single point of contact/account manager to serve as a single point of contact.

Jhpiego’s Dynamics CRM cloud database manages grant information for Jhpiego programs, including customized entities for Proposals, Positionings, Awards, Sub-Awards, Contacts, and Institutions. Due to the customizations we have employed to meet existing business needs, as well as evolving business requirements and application enhancements, we seek a partner who can provide the technical expertise needed to maintain and develop this essential enterprise function.

The services required from the partner are comprised of:

1. Troubleshooting – correct errors identified by Jhpiego
2. Customizations – develop solutions with Microsoft supported code to provide functionality needed to optimize business processes
3. Consultation – provide recommendations and guidance to solve CRM problems, maximize use of CRM, and achieve desired outcomes
4. Maintenance – provide testing and compliance to meet upgrade requirements

When a need arises, Jhpiego will request a quote for the specific scope from the awarded partner selected as a result of this RFP. The partner will propose the cost, based on proposed fixed rates and level of effort, and completion date(s) to be mutually agreed upon with Jhpiego on a case by case basis.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

* Company background
* Microsoft experience
* Dynamics CRM expertise
* Dynamics CRM experience
* Proposed service engagement
* Account management

References will be considered as an evaluation factor if you are selected as a finalist. The references will not be contacted unless Jhpiego informs you in advance.

Directions for Response

All responses to this RFP must include the components and follow the guidelines below. **Any proposal that does not follow these guidelines may be disqualified.**

Complete and submit the following component in your proposal:

Answer Sheet (Excel File)

* + General – 1st tab – Provide your company’s contact information for this RFP process and provide responses to the background and qualification questions.
	+ Project Information – 2nd tab – Identify the number of projects completed within the last 24 months for each service area for all Microsoft Dynamics customers and examples of those where the customer used Microsoft Dynamics to manage grant funding.
	+ Pricing – 3rd tab – Identify proposed hourly rates for the account/project manager and support resources.
	+ References – 4th tab – Please provide at least three customer references Jhpiego may contact. These references must be Microsoft Dynamics customers.

Proposed Account Manager

* + Please provide the CV for your proposed account/project manager.

Direct all responses to the primary contact (see “Contact Details” section) via e-mail by the time indicated (EST - UTC/GMT-5) on the day indicated in the schedule.

Under no circumstance should any bidder attempt to circumvent this RFP process by contacting Jhpiego directly, submitting any proposals, offering discounts outside of the parameters of this process. Please submit all proposals and ask all questions according to the provided timelines and through the channels designated in this document and any other tender documents that may follow. Please direct all questions, information, or concerns to the designated primary contact only.

Questions to the designated primary contact are entirely welcome. However, any violation of these directions will be considered an attempt to gain an unfair advantage over the other competitors, and will result in disqualification of the violating bidder. Any disqualified bidders will be removed from the process and any further submissions by that bidder will not be accepted.

Jhpiego reserves the right to reject any and all proposals and bears no responsibility for any costs of preparing any proposal.

Questions From Bidders

In the interest of fairness and completeness of answers, all questions from all bidders will be aggregated, answered and sent to all bidders on the date and time indicated in the schedule. Please submit your questions to the primary contact identified above **via email** by the day they are due (see “Schedule” section). Jhpiego will not respond to questions over the phone because it becomes difficult to share those same answers with the other firms. Jhpiego will respond to all bidders simultaneously, including all bidders’ questions and their corresponding responses.

Proposal Validity

Vendor shall submit a proposal that is valid for 60 days after the proposal due date per the “Schedule” section above.

Award of Contract

The firm that, in the opinion of Jhpiego, has submitted the proposal providing the best value for Jhpiego based on the evaluation criteria may be awarded a purchase order.

Contract Terms

Any resulting agreement will be conditional upon the vendor’s acceptance of the Johns Hopkins University Terms and Conditions (<http://ssc.jhmi.edu/supplychain/terms-jhu.html>) and must be approved by Jhpiego’s Executive Office. Jhpiego’s standard payment terms are Net 30. It is anticipated that any resulting contract will include fixed rates as proposed as part of this RFP. Our intention is to establish a one-year master services agreement with two option years, beginning on October 1, 2021.