

**REQUEST FOR PROPOSAL NO: 2018-1**  
**Microsoft Dynamics 365 Specialist**

**The New Jersey Historic Trust (NJHT)** is in but not of the Department of Community Affairs. Its mission is to advance historic preservation through education, stewardship and financial investment programs that save our heritage and strengthen our communities. NJHT is the primary provider of bricks and mortar grants to NJ's historic properties through the Preserve New Jersey Historic Preservation Fund (formerly the Garden State Preservation Trust Fund). The Trust also administers grants from the 1772 Foundation, Cultural Trust, Sandy Disaster Relief Grants, and the Discover NJ History License Plate Fund for Heritage Tourism.

**BACKGROUND**

The New Jersey Historic Trust utilizes Microsoft Access to document and track its grant programs and preservation projects. The Trust depends on Access to generate reports and integrate data into forms, letters, and Excel spreadsheets. Currently, the Trust's grants –going back to 1990—are stored in separate Access databases; each one with different interfaces, information tools, and designs. This has made consistent tracking, analysis, and reporting a challenge. NJHT initiated a project with the Department of Community Affairs IT department in 2016. The IT department created one central Access database, and some data has been migrated to it. The challenge has been creating a user-friendly interface and workflow for entering data and making it easy to generate the reports and tracking information that NJHT needs.

**SUMMARY OF OBJECTIVES**

This request for proposal seeks a qualified, Microsoft Partner Organization contractor with expertise in Microsoft Dynamics 365 to analyze the Historic Trust's needs and prepare a Scope of Work which will be used to seek competitive cost proposals for the actual creation of the database. The ultimate goal of this project is to create an accessible, comprehensive user experience for NJHT staff, grant applicants, grantees, and grant reviewers via Microsoft Dynamics 365 (D365). D365 will be used primarily by NJHT staff to manage applications, track documents, financial management processes, easements and the closeout of grants. We envision this project being phased, as follows:

Phase 1 – Scope of Work definition/Requirements gathering

Phase 2 - Creation of the database and migration of two primary grant programs to be fully functioning

Phase 3 – Migration and configuration of remaining programs

Phase 4 – Web-based portal for applicants, evaluators, and NJHT staff

We envision the new database will have the ability to add new programs as needed. Ideally all four phases should be completed and fully functioning within twelve (12) months of project initiation.

Preparation of the Scope of Work will not preclude the successful contractor from bidding on future work.

### **SCOPE OF SERVICES**

This request for proposal seeks a qualified, Microsoft Partner Organization contractor with expertise in Microsoft Dynamics 365 to analyze the Trust's needs and prepare a Scope of Work which will be used to seek competitive cost proposals for the actual creation of a single, streamlined database. This Scope of Services is for phase 1 only.

Expected job duties include:

- Analyze current systems
- Become fully knowledgeable of NJHT's grant making and project management processes
- Determine system needs; operational objectives by studying business functions; gathering information; evaluating output requirements and formats
- Construct workflow charts and diagrams; study system capabilities
- Design a phased project approach relative to budget considerations
- Work closely with NJHT staff
- Work with Department of Community Affairs IT department to understand other grant systems used by the Department; access potential for integration
- Prepare a thoroughly researched written summary of NJHT's database needs
- Prepare a written Scope of Work that will be used to secure competitive cost proposals for the design of the system

The successful contractor will need to carefully work with NJHT on budget assumptions. Assumptions should include that the Department of Community Affairs IT department will procure any/all licenses, as well as perform routine maintenance to sustain the system.

NJHT estimates the preparation of this Scope of Work to cost between \$15,000-\$17,000. The State withholds the right to review and approve the final deliverable prior to authorizing final payment.

### **QUALIFICATIONS**

- Bachelor's degree in Computer Science, Business Administration or related field
- Strong experience configuring Microsoft Dynamics 365 databases
- Practical application ability with Microsoft Office Access
- Software development life cycle methodologies and techniques
- Detailed analytical abilities

- Strong experience in user testing
- Experience with grant making organizations a plus
- Experience with state government a plus

### **PROPOSAL SUBMISSION**

Proposals must include a sample Scope of Work. Proposals should also clearly identify the likely tasks to be undertaken, including estimates of hours needed for each task, expected outcomes and provide cost estimates for design of the system. The proposal must include a narrative identifying the methodology and steps needed to achieve the desired information. The project cost proposal should be itemized by the proposed tasks. Any anticipated travel and/or reimbursable expenses should also be itemized. Prices must be guaranteed for nine months following deadline for submission.

The following items should be included in the proposal:

- Sample Scope of Work document;
- resumes for the individuals that would be principally involved in executing this project;
- proposed timeline;
- itemized cost proposal;
- client list and references; and
- examples of similar project undertakings

### **PROPOSAL DEADLINE & ADDITIONAL INFORMATION**

Questions about this RFP should be submitted in writing to: [Dorothy.guzzo@dca.nj.gov](mailto:Dorothy.guzzo@dca.nj.gov)

If selected as the consultant for this RFP, you must provide

- A valid NJ Business Registration certificate
- Registration in NJSTART vendor system
- A current NJ Certificate of Employee Information Report/Affirmative Action Certificate (or provide the State of NJ Employee Information Report and a \$150 check to the NJ Dept. of Treasury to attain a new certification)

Complete DPA form packet [http://www.nj.gov/treasury/purchase/forms/DPA\\_Packet.pdf](http://www.nj.gov/treasury/purchase/forms/DPA_Packet.pdf)

Proposal with all supporting material should arrive by **4:00 pm on Tuesday, April 24, 2018** to:

**E-mail:**

[Dorothy.guzzo@dca.nj.gov](mailto:Dorothy.guzzo@dca.nj.gov)

If you anticipate submitting your proposal electronically, we cannot accept attachments of more than 10 MB in size.

**If Using US Postal Service:**

Dorothy P. Guzzo, Executive Director  
New Jersey Historic Trust, PO Box 457, Trenton, NJ 08625

**Hand Delivery:**

Dorothy P. Guzzo, Executive Director  
New Jersey Historic Trust, 101 South Broad Street, 6<sup>th</sup> floor, Trenton, NJ 08608