



**Request for Proposals (“RFP”) for Review and Assessment of
Microsoft Office 365 Teams Design and Delivery**

The Massachusetts Housing Finance Agency (“MassHousing”) invites proposals from qualified firms interested in entering into a contract for Office 365 (O365) Teams Design, Delivery Review and Security Assessment Services described in Attachment A (the “Services”).

If your firm is interested in providing the Services to MassHousing, please submit to my attention at the address below, the following:

(A) Background Information. A cover letter or executive summary signed by a person authorized to enter into a contract with MassHousing containing at least the following information: (i) name, address, and telephone number of a contact person, (ii) description of the firm (please be as comprehensive as possible in the description of the firm and include information supporting financial stability), and (iii) the firm’s Federal Taxpayer I.D. Number. MassHousing is an equal opportunity employer, and encourages responses from entities which are certified as minority and women-owned business enterprises (MBEs and WBEs), veteran-owned business enterprises (VBEs), disability-owned business enterprises (DBEs), and lesbian/gay/bisexual/ transgender-owned business enterprises (LGBTBEs). If your firm is certified as one or more of the above, please include evidence of such certification(s) or the basis for such designation(s).

(B) Experience in providing the Services. Describe the experience of the firm and its personnel in providing similar services. Attach resumes of personnel (or sub consultants, if any) who will be providing the Services.

(C) Work Plan. Provide a description of the plan or approach, the role of each staff member (or sub-consultants, if any) expected to perform the Services, and the proposed time frames for completion of the Services. Please respond specifically to any questions or specifications requested in the description of the Services.

(D) Business References. A list of three (3) verifiable client references.

(E) Fee Schedule. A proposed schedule of fees (and expenses), including hourly rates for persons performing the Services or fixed rate for completion of the Services.

(F) Conflicts of Interest. Any known facts which would or may create a conflict of interest with MassHousing if you were awarded a contract for the Services.

(G) Outstanding Claims, Litigation or Threats of Litigation. Any outstanding claims, litigation, or threats of litigation against your firm or its members.

(i) Debarment. List any instances in which your firm has been debarred by state or federal government and describe the circumstances for the debarment.

Responses must be received in electronic form and delivered to it.rfpsubmissions@masshousing.com with a time stamp no later than 12:00 P.M. on September 16, 2020

MassHousing will review the responses to this RFP, speak with client references and may decide to interview all or some of the respondents.

<u>Event</u>	<u>Date</u>
RFP Issuance	August 26, 2020
Submission of Proposal (electronic only)	September 16, 2020, 12:00 pm EST
Completion of Evaluation	September 25, 2020
Contract Award	September 30, 2020
Commence Services with MassHousing	October 12, 2020

If MassHousing determines that interviews are necessary, the interviews will be held during the period September 21–23, 2020.

We anticipate that the selected respondent will be notified by September 30, 2020 and anticipate work on the Services to commence on October 12, 2020.

MassHousing will evaluate respondents based upon (a) the response to this RFP; (b) interview results (if any); (c) references; and (d) any other information requested by MassHousing. MassHousing, in its sole discretion, will make its selection based on the following criteria:

- Understanding of and approach in providing the Services;
- Demonstrated experience and qualifications of firm and personnel in the performance of similar services;
- References;
- Proposed fee structure; and
- MBE, WBE, VBE, DBE, or LGBTBE status.

MassHousing is soliciting competitive proposals pursuant to a determination that such a process best serves the interests of MassHousing and not because of any legal requirement to do so. MassHousing accordingly reserves the right to accept any one or more than one proposal; to withdraw or cancel this RFP; to modify or amend, with the consent of the respondent, any proposal prior to acceptance; to reject any or all proposals or waive any informality and otherwise to affect any agreement that MassHousing in its sole judgment,

deems to be in its best interest. The successful respondent will be required to enter into MassHousing's Standard Services Agreement, a copy of which will be provided to any respondent upon request.

Should you have any questions concerning this RFP, please submit to the following email address, it.rfpsubmissions@masshousing.com. In order to ensure fairness, MassHousing will determine, in its sole discretion whether and how to best respond any inquiry regarding this Request for Proposals. Should a question(s) warrant a response, MassHousing will post all responses to masshousing.com.

Attachment A

Scope of Services

MassHousing is seeking proposals for assistance with validating our design and delivery of Office 365 (O365) Teams including analysis of existing technical configurations and current methodology related to delivery to departments/divisions. Our goal is to develop design and delivery standards, with best practices in mind, based on proven success with our partners in the business.

About Us

MassHousing is an independent, quasi-public agency created in 1966 and charged with providing financing for affordable housing in Massachusetts. The Agency raises capital by selling bonds and lends the proceeds to low- and moderate-income homebuyers and homeowners, and to developers who build or preserve affordable and/or mixed-income rental housing. MassHousing does not use taxpayer dollars to sustain its operations, although it administers some publicly funded programs on behalf of the Commonwealth. Since its inception, MassHousing has provided more than \$22 billion for affordable housing.

Background

MassHousing is an O365 customer and considers itself a “Microsoft Shop”. Initially, the driver to subscribe to the service was to increase e-mail availability, allowing us to make e-mail more accessible to users, while addressing business continuity considerations. Once the e-mail migration was successfully completed, we began to explore the value of other features of O365.

Parts of the business have been exposed to O365 and Teams and interest and the need for a collaborative business solution is there. The need for enhanced Teams development and deployment standards is required as additional collaborative business opportunities are identified. At this time, collaboration with external business partners using O365 and Teams has not been developed or deployed.

MassHousing will be taking a controlled approach to its Teams deployment. Where our managed approach involves mandating Teams use for specific departments/division of the Agency. Our approach also involves tightly controlling who can use it and who can do certain things within Teams, resulting in a phased rollout plan across the Agency.

It must be noted, as O365 subscribers, we are utilizing SharePoint Online as our SharePoint solution; no on-premises components exist. Microsoft Teams has been fully enabled in one division. Skype for Business has been available for many years but is not utilized by many staff members.

MassHousing is in the government tenant – Office 365 Government G5.

Services Requested

MassHousing has internal expertise both from a business analyst and technical perspective. Interfacing with the business lines or direct building or configuration of O365 and Teams is not anticipated. MassHousing is interested in partnering with a firm that has the experience and expertise to review the foundation we have built and provide validation and guidance on how we can make improvements in our 1. design, 2. delivery and 3. security.

1. Design

- Best practices related to where and how to deploy Teams and Channels
 - Review existing layouts and provide guidance on creating a uniform approach
 - Guidance on ensuring existing SharePoint Online sites are ready for conversion to Teams
- Best practices for new site development of SharePoint Online and the default document library
- Guidance on permissions and security options including sensitive information
- Guidance for video calling and screen sharing for seamless collaboration with internal and external customers
- Best practices for fully deployed telephony
- Best practices Teams and E-Discovery

2. Delivery and Training

- Validation and guidance on our delivery approach:
 - Review standards developed related to delivery timeline and phased approach to discovery, delivery, and ongoing support/feedback
 - Guidance on enhancing business analysis techniques to gather preliminary information and ensure a streamlined approach
- Best practices for real-time messaging and historic tracking
- Best practices for taking full advantage of Microsoft's shared workspace Hub using Teams, Word, Excel, PowerPoint, OneNote, and SharePoint
- Best practices for improved meeting experiences and scheduling capabilities
- Best practices for Service Desk personnel including effective support and troubleshooting
- Guidance on the effective coordination of Teams and OneDrive

3. Security

- With an emphasis on external collaboration, ensure best practices and options for securing communication and data that is created in Teams and SharePoint
- Ensure best practices related to Team and Channel level permissions
- Usage, auditing and KPI best practices
- Specific guidance on internal and external security

We anticipate this engagement in two phases:

1. A ramp-up phase that is structured, where the existing O365 and Teams foundational design is reviewed, and standards and methodologies are developed for future solutions
2. Additional assistance, for a phased department/division rollout