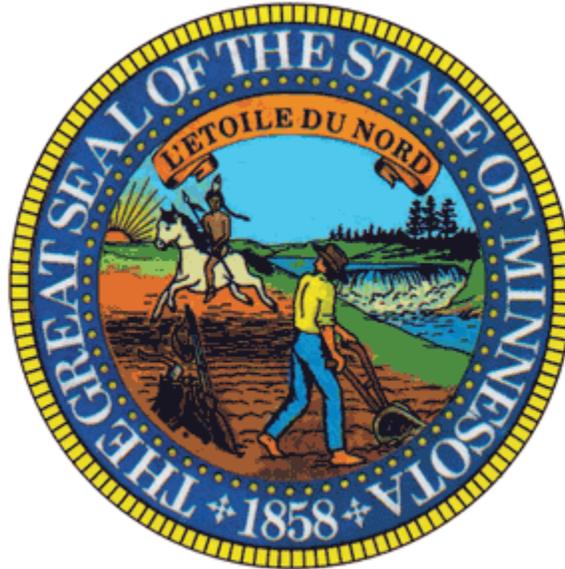


State of Minnesota

MINNESOTA STATE RETIREMENT SYSTEM (MSRS)



Quick Call for Proposals (“Quick Call”)

Request for Proposal (RFP)

Microsoft Dynamics Great Plains Upgrade

September 4, 2019

- Responses must be received not later than 3:00 p.m., Central Time, September 20, 2019
- Late responses will not be considered

SPECIAL NOTICE: This Quick Call for Proposals does not obligate the State of Minnesota or the MSRS to award a contract or complete the proposed program, and the State reserves the right to cancel this solicitation if it is considered in its best interest.

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SECTION 1 – INSTRUCTIONS TO RESPONDERS

Steps for Completing Your Response	Follow the steps below to complete your response to this Quick Call: Step 1: Read the solicitation document and ask questions, if any Step 2: Write your response Step 3: Sign and submit your response
Incomplete Submittals	A proposal must be submitted along with any required additional documents. Incomplete proposals that materially deviate from the required format and content may be rejected.

STEP 1 – READ THE SOLICITATION DOCUMENT & ASK QUESTIONS, IF ANY

How to Ask Questions	The contact person for questions is: Kris Wenner, Contracts Manager MSRS kris.wenner@msrs.us
	Questions must be emailed to the contact person by September 10, 2019. Other personnel are not authorized to answer questions regarding this Quick Call.

STEP 2 – WRITE YOUR RESPONSE

Quick Call for Proposals	The Quick Call starts on Section 3. Insert your response to the questions as asked or provide content as requested.
	By signing this response, your firm is making a legal, binding offer for a contract to provide services to the State of Minnesota.

STEP 3 – SIGN & SUBMIT YOUR RESPONSE

Where to Send Your Response	Mail your response to: Minnesota State Retirement System Kris Wenner, Contracts Manager 60 Empire Dr., #300 St. Paul, MN 55103 Kris.wenner@msrs.us
	Fax responses will not be accepted. All costs incurred in responding to this RFP will be borne by the Responder.
Response Submission Deadline	Responders may choose to mail or email their response. Mailed responses must be received no later than 3:00 p.m., Central Time, September 20, 2019, as indicated by a notation made by the MSRS Front Desk receptionist; emailed responses must be received by the same date and time at: kris.wenner@msrs.us

SECTION 2 – QUICK CALL PROJECT INFORMATION

A. Description of Project

Minnesota State Retirement System (MSRS) requests proposals to provide assistance in performing an upgrade from Microsoft Dynamics GP 2015 R2 to Microsoft Dynamics GP 2018, or most current version. MSRS is the administrator of a multiple-employer public employee retirement system. The system consists of five defined benefit funds and four defined contribution funds, each with their own financial statements. The defined benefit funds provide retirement, survivor, and disability benefit coverage for Minnesota state employees, as well as non-instructional employees at the University of Minnesota, and other select metropolitan agency employees. MSRS defined benefit members include over 57,000 active employees, and benefits are paid to almost 46,000 retirees, survivors, and disabled members. A third-party administrator provides recordkeeping services for the defined contribution funds, which in total include over 180,000 member accounts with balances.

B. Scope of Work

The objective for this project is to assist in performing an upgrade from 2015 R2 to Microsoft Dynamics GP 2018, or most current version.

MSRS seeks assistance with an approach that includes the following steps:

1. Upgrade to Microsoft Dynamics GP 2018 and currently installed companion products* code and data to Microsoft Dynamics GP version 2018—pre-production and production
2. Upgrade Microsoft Dynamics GP Modified Reports Dictionary and Modified Forms Dictionary per installed product and module from GP version 2015 to version Microsoft Dynamics GP 2018, and document process—pre-production and production
3. Migrate and transfer Microsoft Dynamics system and company SQL databases to Dynamics GP 2018, or most current version—pre-production and production
4. Upgrade Microsoft Dynamics Management Reporter to support Microsoft Dynamics GP 2018, or most current version, and document process—pre-production and production
5. Update integrations to internal and external systems
6. Update the SmartConnect Web Services custom configuration
7. Propose reporting tools outside of Management Reporter
8. Provide workstation installation documentation and up to one (1) hour of installation instruction
9. Provide up to two (2) hours of introduction and review of the new features of Microsoft Dynamics GP version 2018
10. Provide testing and post-production upgrade assistance
11. Assist in project planning and project management throughout the course of this project

Note:

* Companion products to be installed at Client by vendor:

- eOne Solutions—SmartConnect, SmartList Builder

* Companion products currently installed at Client that will be removed by vendor and not be upgraded:

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- FastPath—Config AD/SSP, Audit Trails

Responders are encouraged to propose additional tasks or activities if they will substantially improve the results of the project. **These items must be separated from the required items on the Cost Proposal (See Section 4).**

The Responder will work closely with MSRS staff persons and consult with its partners, including Minnesota Management and Budget (MMB), and Minnesota Department of Administration: Materials Management Division (MMD).

On-site project activities will occur primarily at:

Minnesota State Retirement System
60 Empire Drive, Suite 300
St. Paul, MN 55103

C. Minimum Qualifications Required

The Responder must have a current Microsoft “Customer Source” account to have the ability to download Dynamics GP from Microsoft.

D. Desired Skills

MSRS desires a Responder with knowledge of the State of Minnesota’s Statewide Integrated Financial Tools (“SWIFT”), which is a PeopleSoft/Oracle application.

E. Response Evaluation

Responses will first be reviewed to confirm compliance with the minimum qualifications identified above. Responses that meet all the minimum qualifications will be further evaluated in accordance with the following:

Factors	Percentage
Qualifications	35%
Approach to Project	35%
Cost *	30%

*Proposals will be evaluated on “best value”. The cost proposal will not be opened by the review committee until after the qualifications points are awarded.

All responses received by the deadline will be evaluated by representatives of the MSRS. Proposals will first be reviewed for responsiveness to determine if the minimum requirements have been met. Proposals that fail to meet minimum requirements will not advance to the next phase of the evaluation. The State reserves the right, based on the scores of the proposals, to create a short-listing of vendors who have received the highest scores to interview, or conduct demonstrations/presentations. The state reserves the right to seek best and final offers from one or more Responders.

SECTION 3 – VENDOR RESPONSE

INSTRUCTIONS: Fill in the information requested below.

1. Responder Contact Information

Company's Full Legal Name:	
Business Address:	
Contact Person's Name:	
Telephone Number:	
E-Mail Address	

2. Qualifications

Describe the company background. Detail the experience and qualifications of all personnel proposed to work on the project.

3. Approach to Project

Describe your overall approach to the work. How will you accomplish the goals of the project? Who will do the work? What are the timelines and final deliverables?

4. Alterations or Additions to the State's Quick Call Terms & Conditions

If you wish to take an exception to the State's Quick Call Terms and Conditions (see Section 5), please indicate that below and attach any appropriate documentation.

None

See attached document detailing proposed alterations and/or additions to the State's Quick Call terms and conditions.

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SECTION 4 – COST PROPOSAL

Follow the instructions below when completing your Cost Proposal.

Responder must submit a cost proposal that details a list of all deliverables and a corresponding cost for the performance of each deliverable. Detail the number of hours estimated to complete each deliverable and all hourly rates utilized and calculate the total of each deliverable.

Cost Proposal

	Deliverable/Description	Hours	Rate	Total
1	Dynamics GP and third-party upgrade: Pre-production and production			
2	Training, troubleshooting and new feature review – Pre-production and production			
3	Custom development and support			
	TOTALS			

Responders are may propose additional tasks or activities if they will substantially improve the results of this contract. Describe additional work and list hours/fees.

Optional Cost Proposal

	Deliverable/Description	Hours	Rate	Total
1	<i>Other (describe)</i>			
2				
3				
	TOTALS			

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SECTION 5 – RESPONDER CERTIFICATIONS

Responder must check each box to certify to the conditions required under this Quick Call. Please note that some certifications may require the submission of additional information. Sign below to finalize response.

A. Required

- I have read and am aware of the **State’s Quick Call terms and conditions**, which is available at www.mmd.admin.state.mn.us/pdf/Quick%20Call%20T&C.pdf
- I have read and am aware of the **State’s contract terms and conditions**, which can be found in the sample contract at www.mmd.admin.state.mn.us/pdf/samplecontract.pdf.

- Noncollusion Affirmation.** I certify
 - That I am the Responder (if the Responder is an individual), a partner in the company (if the Responder is a partnership), or an officer or employee of the responding corporation having authority to sign on its behalf (if the Responder is a corporation).
 - That the proposal submitted in response to the Quick Call has been arrived at by the Responder independently and has been submitted without collusion with and without any agreement, understanding or planned common course of action with, any other Responder of materials, supplies, equipment, or services described in the Quick Call, designed to limit fair and open competition.
 - That the contents of the proposal have not been communicated by the Responder or its employees or agents to any person not an employee or agent of the Responder and will not be communicated to any such persons prior to the official opening of the proposals.

- That I am fully informed regarding the accuracy of the statements made in the proposal.

If Applicable

- I am a **certified veteran-owned business**, in accordance with Minn. Stat. § 16C.16, subd. 6a and § 16C.19 (d). The eligibility criteria are available at www.mmd.admin.state.mn.us/pdf/Quick%20Call%20T&C.pdf.
- I am a **resident vendor**, in accordance with 2013 Minn. Laws, Chapter 142, Article 3, Sec. 16. The eligibility criteria are available at www.mmd.admin.state.mn.us/pdf/Quick%20Call%20T&C.pdf.

By signing here, I warrant that the information provided in this proposal is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate or misleading information may be grounds for disqualification from contract award and may subject me/my company to suspension or debarment proceedings, as well as other remedies available to the State, by law.

Signature

Title

Date