



**Mexican American Opportunity Foundation**  
Empowering Families from Child to Senior

## **Addendum 1**

# **Request For Proposal RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)**

January 30, 2026

Mexican American Opportunity Foundation (hereinafter alternately "MAOF"), operated under a nonprofit agency, is seeking bids from highly qualified **FIRM** with expertise in providing to design, configure, implement, and support a centralized Intake and Case Management solution using Microsoft Dynamics 365 / Dataverse through a competitive bid process. Proposers must submit a fixed-cost proposal in the format prescribed in Exhibit B with the initial term of three (3) years, with two (2) additional optional year extensions, subject to annual review and performance and availability of grants. This process requires the firm to submit a proposal that includes a complete bid for the "Scope of Work" outlined below in Exhibit-A (SOW) and three references.

The CLOSING for this **RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)**, is on **February 18, 2026, at 4 pm (PST)**. All correspondence regarding this request shall be submitted in writing to [Procurement@maof.org](mailto:Procurement@maof.org). To download this RFP, Proposers must go to the webpage: [www.maof.org](http://www.maof.org), under the About Section/Click Procurement to look for the RFP. Proposals must be received by MAOF no later than **February 18, 2026, at 4 pm (PST)**. **Electronic responses to the proposal are acceptable:** Please submit the proposal in referencing: "**RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)**".

Proposals received after the deadline will be automatically disqualified. For physical mailing address, please courier or deliver to:

**Mexican American Opportunity Foundation (MAOF)**  
**Attn: Procurement Department**  
**401 N. Garfield Avenue**  
**Montebello, CA 90640**  
**T: 323-278-3600**

To request this RFP bidding packet, please contact Procurement Department at [Procurement@maof.org](mailto:Procurement@maof.org).

Respectfully,

**MAOF**  
**Procurement Department**

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## Introduction

The Mexican American Opportunity Foundation (MAOF) is a nonprofit, community-based organization established in 1963 to serve disadvantaged individuals and families in the Los Angeles area. MAOF is the largest Latino-oriented family services organization in the United States. It has achieved this status by providing high-quality social services and programs to those communities where the need is the greatest.

**Mission Statement:** "The mission of the Mexican American Opportunity Foundation (MAOF) is to provide for the socio-economic betterment of the greater Latino community of California while preserving the pride, values, and heritage of the Mexican American culture. This is accomplished through programs in early childhood education and family services, job training, and senior lifestyle development throughout the multi-cultural communities served by MAOF." MAOF is joined in this mission by government agencies, public and private foundations, and Corporate America.

## 1.0 GENERAL INFORMATION

A. **Purpose.** This Request for Proposals (RFP) is to solicit proposals from Responsible Respondents who provide the goods and services identified on the RFP cover sheet and further described in Section 2 of this RFP. The Agency intends to award a Contract for the initial period specified on the RFP cover sheet. In its sole discretion, the Agency may extend the Contract for up to the number of extensions identified on the RFP cover sheet.

B. **Definition.** For this RFP and the resulting Contract, the following terms shall mean:

"**Agency**" means the MAOF, the Agency, boards, and any political subdivisions making purchases from the Contract as permitted by this RFP.

"**Contract**" means the Contract(s) entered into with the successful Respondent(s).

"**General Terms and Conditions**" means the General Terms and Conditions for Service Contract as referenced on the RFP cover page.

"**Proposal**" means the Respondent's proposal submitted in response to the RFP.

"**Respondent**" means the company, organization or other business entity submitting a proposal in response to this RFP.

"**Responsible Respondent**" means a Respondent that has the capability in all material respects to perform the scope of work and specifications of the Contract. In determining whether the Respondent is a Responsible Respondent, the Agency may consider various factors, including, but not limited to the Respondent's competence and qualifications to provide the goods or services requested, the Respondent's integrity and reliability, the past performance of the Respondent, and the best interest of the Agency.

"**Responsive Proposal**" means a Proposal that complies with the material provisions of this RFP.

"**RFP**" means Request for Proposals and any attachments, exhibits, schedules, or addenda hereto.

C. **Overview of the RFP Process,** This RFP is designed to provide Respondents with the information necessary to prepare competitive Proposals. The RFP process is for the Agency's benefit and intends to provide the Agency with competitive information to assist in the selection process. It is not intended to be comprehensive, and each Respondent is responsible for determining all factors necessary to submit a comprehensive Proposal.

The Agency intends to evaluate Proposals from all Respondents that submit timely responsive proposals and award the Contract following the evaluation and selection criteria provided in this RFP.

## 2.0 STATEMENT OF WORK

See Exhibit-A, pages 13-20.

### **3.0 PROPOSAL REQUIREMENTS & CONTENTS**

#### **A. GENERAL REQUIREMENTS:**

1. To be considered for selection, proposers must submit a complete response to this solicitation either electronic or email bid to the addresses as directed in referencing " **RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)**". The proposer shall make no other distribution of the proposals.
2. Proposals shall include a letter of transmittal signed by an authorized representative of the proposer. All information requested should be submitted. Please submit all requested information. MAOF may reject proposals that are substantially incomplete or lack key information.
3. Proposals should be prepared, as thorough and detailed as possible, providing a straightforward, concise description to satisfy the solicitation's requirements. Emphasis should be placed on completeness and clarity of content.
4. All responsive proposals are to be submitted on standard 8.5" X 11" paper size and 12-point font minimum type. Proposers shall respond to the items in the order they are shown in the solicitation. The responses should describe the most favorable terms and remain firm for 60 days from the proposal opening date.
5. Price should be submitted on the attached Pricing Sheet (APPENDIX-A), including any applicable federal, State, and local taxes. The Contractor shall provide an all-inclusive price, including labor and material for the services.
6. Ownership of all data, materials, and documentation originated and prepared for this solicitation by any proposer shall belong exclusively to MAOF.

All pages of the proposal should be numbered and should be addressed in the proposer's response in the following order:

- a. Proposer's Cover Page in Appendix-A of this RFP must be completed and signed.
- b. Letter of transmittal, signed by an authorized representative of the proposer.
- c. Table of Contents, cross-referencing the contents of the proposal.
- d. Pricing Sheet in the attachment Appendix-A to this solicitation must be completed and signed.
- e. Vendor Identification Form must be completed and signed. A blank form is included in the attachment (Appendix-B) to this RFP.
- f. Contractor shall include a copy of the current business license.
- g. Include a copy of the current certificate of liability insurance evidencing coverage of the minimum required in this solicitation.

Award of the Contract resulting from this RFP will be based upon the most responsive vendor whose offer will be the most advantageous to MAOF in terms of cost, functionality, qualifications, and other factors as specified elsewhere in this RFP.

#### **MAOF reserves the right to:**

- a. Reject any or all offers and discontinue this RFP process without obligation or liability to any potential candidate, when it is in the Agency's best interest; and
- b. Accept other than the lowest priced offer.

#### **The proposal shall:**

- a. Include the completed Bid Submittal per Rate Worksheet on Exhibit-B attached here to. Costs must be identified as per hourly rate. The Contractor's rates shall remain firm and fixed for the term of the Contract. The Contract (hourly, daily, monthly, Unit Rate, etc.) rate after 3-year terms may be adjusted annually based on the increase or decrease in the U.S. Department of Labor, Bureau of Labor Statistics' Consumer Price Index (CPI) for the Los Angeles-Riverside-Orange County Area for the most recently published percentage change for the twelve (12) month period preceding the Contract anniversary date, which shall be the effective date for any cost of living adjustment.
- b. Provide at least three current client references for which you have performed similar work. References should include contact name, address and telephone number.
- c. Complete and return rate worksheet, EXHIBIT-A as Firms proposed, along with other documentation and references.
- d. Two (2) sets of copies of proposals, including rate worksheet shall be submitted via **email marked: "RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)"** or via **courier to:**

**PLEASE DELIVER TO:**

Mexican American Opportunity Foundation (MAOF)  
**Attn: Procurement Department**  
401 N. Garfield Avenue  
Montebello, CA 90640  
T: 323-278-3600  
[Procurement@maof.org](mailto:Procurement@maof.org)

**DEADLINE FOR SUBMISSION: All proposals are due by Wednesday, February 18, 2026, at 4 pm. Any bid received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be considered and evaluated.**

Selected firm must have the ability to establish working relationships with staff members and adults from a wide variety of educational and socio-economic backgrounds. They must also have knowledge of a wide variety of community resources and ability to establish working relationships with staff members of administrative related agencies and institutions.

- W-9
- Professional Liability Insurance
- Written statements regarding Worker's Compensation Insurance
- Vehicle Insurance
- California Driver's License

- e. To be considered responsive, a proposal must contain the following, referenced by number and in the order below:
  1. A brief description of the history and organization of the bidder's firm, and of any proposed subcontractor.
  2. A statement that business licenses, professional certifications or other credentials necessary for the performance of the services here sought are in place, together with evidence that bidder, if a corporation, is in good standing and qualified to conduct business in California.
  3. A description of similar projects completed by the bidder within the past two (2) years.
  4. Qualifications, background and experience of staff proposed to work on the project.
  5. References with contact information from organizations that have used bidder's services for similar projects/type of work within the last 12-18 months.

6. A general description of the techniques, approaches and methods to be used in completing the project.
7. A description of the chronology for completing the work, including a timeline and deadlines for each task, if any.
8. A detailed description of bidder compensation formula, including any travel costs and other expenses. Bidders must submit a sample of a breakdown of charges and costs, detailed by job function/title of those servicing, as well as a maximum not-to-exceed total for all services. All travel, lodging and miscellaneous support costs are to be included in this billing rate. Invoices for services satisfactorily performed must be itemized by date and services performed and reference. As the MAOF may award a contract based on the initial offer, a bidder should make its initial offer on the most favorable terms available. The MAOF reserves the right, however, to have discussions with those bidders falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

Proposals which fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. Note that responses to questions must be specifically answered within the context of the submitted proposal. The MAOF's evaluation team will not refer to a designated web site, brochure, or other location for the requested information. Responses that utilize references to external materials as an answer will be considered non-responsive.

#### **4.0 CRIMINAL BACKGROUND CHECK**

If applicable, MAOF can require the awarded Contractor to provide the following for their team members assigned to each MAOF location:

- Criminal background check for each team member performing services;
- Drug screening check for each team member performing services;
- T.B. Test; and
- Child Protection Registry checks for each team member performing services.

#### **5.0 INVOICING/BILLING**

Invoice of timesheet will be given to the MAOF's H.R. Coordinator on the first of each month. Payment for services rendered will be made 30 calendar days from date of submitting monthly accountability service summary and invoice.

#### **6.0 SCHEDULE OF EVENTS**

The dates provided in the procurement timetable on the RFP cover sheet below are provided for informational and planning purposes. The Agency reserves the right to change the dates. If the Agency changes any of the deadlines for Respondent submissions, the Agency will issue an addendum to the RFP.

Release of RFP **January 30, 2026**

Deadline for submission **February 18, 2026**

Selection completed/contract negotiations begin by **March 2, 2026**

Notification of award will be sent once a decision is finalized.

#### **7.0 INQUIRIES**

Questions regarding this RFP are to be submitted to [Procurement@maof.org](mailto:Procurement@maof.org) with " **RFP 26-003 Centralized Intake & Case Management Implementation (Microsoft Dynamics 365)**" in the subject line. Questions regarding this RFP will only be accepted by email.

## **8.0 TERMINATION**

**8.1** This Contract may also be terminated by MAOF in the event that the project is permanently abandoned, as determined in the sole discretion of MAOF. MAOF may terminate the Contract in whole or in part whenever MAOF specifies, in its sole discretion, that such termination is in the interest of MAOF. Whenever the Contract is terminated following this paragraph, the Contractor shall be entitled to payment for actual work performed at unit contract prices for completed items of work. An equitable adjustment in the contract price for partially completed items of work will be made. Still, such adjustment shall not include provision for loss of anticipated profit on deleted or uncompleted work. Termination of this Contract by MAOF at any time during the term, whether for default or convenience, shall not constitute a breach of Contract by MAOF.

**8.2** In addition, either Party may terminate the Contract if the other Party breaches any of its duties and obligations under this Contract and fails to cure such breach within thirty (30) days after receiving notice specifying the breach. MAOF reserves the right to terminate without warning in case of a critical or material breach of the Contract.

## **9.0 HOLD-HARMLESS AND INDEMNIFICATION**

The successful Contractor shall be liable for any injury, damage, or loss occasioned by negligence or omission of the successful Contractor, its agents, or any other person the successful Contractor has designated to visit MAOF property and shall indemnify and hold harmless the Board, its officers, employees, agents, volunteers from any liability arising in the performance of this Contract. The Contractor's obligation under this section shall not extend to any.

## **10.0 CONFIDENTIALITY**

**10.1 Confidential Information.** Under this Agreement, "Confidential Information" refers to any Information of a Party ("Disclosing Party") that has been disclosed to the other Party ("Receiving Party"), which is designated in writing as confidential, proprietary, or secret or under the context of its disclosure ought to reasonably be considered as confidential. Personal information includes, but is not limited to, all information concerning a Party's existing business, business systems, business plans and information systems, trade secrets, prices, and pricing information.

**10.2 Use of Confidential Information.** Each Party will comply with all laws and regulations for the use, transmission, storage, disclosure, or destruction of Confidential Information. Both Parties agree to hold the other Party's Confidential Information in strict confidence. The Contractor agrees not to use Company's Confidential Information in any way except as expressly permitted by or required to achieve the purposes of this Agreement, and the company agrees to use Contractor's Confidential Information solely to perform the Services. Both Parties agree to use all reasonable efforts to protect against unauthorized use or distribution of Confidential information, and the Receiving Party agrees to use at least the same degree of care to prevent disclosing to third parties the Confidential Information of the Disclosing Party as the Disclosing Party uses to protect its own Confidential Information. The Receiving Party further agrees not to disclose or permit any third-party access to the Disclosing Party's Confidential Information, except such disclosure or access will be permitted in order to perform the Services provided under this Agreement. Each Party agrees to ensure that its employees, agents, representatives, and contractors are advised of the confidential nature of the Confidential Information and are precluded from taking any action prohibited under this Agreement.

## **11.0 GENERAL TERMS AND CONDITIONS**

### **1. Additions and Deletions of Service:**

MAOF reserves the right to add and delete goods or services to any contract with the Contractor. Should a requirement be deleted, payment to the Contractor shall be reduced proportionally to the amount of service reduced following the bid price. Should additional services be required from the Contract, prices for such additions will be negotiated between the Contractor and MAOF.

### **2. Termination of Contract:**

**2.1** MAOF may also terminate this Contract in the event that the project is permanently abandoned, as determined in the sole discretion of MAOF. MAOF may terminate the Contract in whole or in part whenever MAOF determines, in its sole discretion, that such termination is in the interest of MAOF. Whenever the Contract is terminated following this paragraph, the Contractor (s) shall be entitled to payment for actual work performed at unit contract prices for completed work items. An equitable adjustment in the contract price for partially completed items of work will be made, but such adjustment shall not include a provision for loss of anticipated profit on deleted or uncompleted work. Termination of this Contract by MAOF at any time during the term, whether for default or convenience, shall not constitute a breach of Contract by MAOF.

**2.2** In addition, either Party may terminate the Contract if the other Party breaches any of its duties and obligations under this Contract and fails to cure such breach within thirty (30) days after receiving notice specifying the breach. MAOF reserves the right to terminate without warning in the event of a critical and material breach of the Contract.

### **3. Licenses:**

By submitting a proposal, the proposer certifies that it has procured and shall maintain in full force all permits and state bar licenses required to conduct its business lawfully and that it shall remain informed of and in compliance with all federal and local laws, ordinances, and regulations that affect in any manner contractor's fulfillment of the Contract.

### **4. Anti-Kickback Provision:**

This Contract is subject to the provisions of the AntiKickback Enforcement Act of 1986. By agreeing to this binding Agreement, the transacting parties (1) certify that they have not paid kickbacks directly or indirectly to any employee of MAOF for the purpose of obtaining this or any other agreement, purchase order, or Contract from MAOF and (2) agree to cooperate fully with any Federal Agency investigating a possible violation of the Act.

### **5. Non-Collusion/Fraud:**

By submitting a proposal, the proposer warrants and certifies that neither the proposer nor its employees or associates have contacted any unauthorized UPO employee, officer, or elected official regarding the contents of this solicitation or the solicitation process. Proposer further warrants and certifies that neither the proposer nor its employees or associates has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in response to this solicitation. Suppose at any given time, it is found that the proposer or its employees or associates have, in the presenting of its proposal, colluded with any other party or parties to prevent or restrict free competitive bidding. In that case, its proposal shall be immediately rejected. Any contract awarded prior to MAOF's discovery of proposer's collusion shall be terminated, and the proposer shall be liable for all damages sustained by MAOF due to the proposer's collusion.

**6. Equal Opportunity:**

The proposer agrees not to discriminate against any employee or applicant for employment on Account of any services or activities made possible by or resulting from this RFP on the grounds of actual or perceived sex, race, color, religion, national origin, age, marital status, disability, personal appearance, sexual orientation, gender identity or expression, familial status, family responsibilities, matriculation, political affiliation, genetic information, source of income, place of residence or business, veteran status or any other characteristic protected under federal or District law. Any violation of this provision shall be considered a violation of a material provision of this Agreement and shall be grounds for cancellation, termination, or suspension in whole or in part of the Agreement by MAOF, which may result in ineligibility for further MAOF contracts. At all times in the proposal and contract process, the proposer shall comply with all applicable MAOF, CA, and Federal Anti-Discrimination Laws, Rules, Regulations, and Requirements.

**7. Right to Audit:**

MAOF shall have the right to audit all invoices submitted by the Contractor. The organization shall have the right to audit all relevant data based on the Contractor's fees upon request.

**8. Informal Communication:**

From the date of receipt of this RFP by each proposer and until a binding contractual agreement exists with the awarded Contractor and all other proposers have been notified, or when MAOF rejects all proposals, informal communications regarding this procurement shall cease. There shall be no requests from proposers to any Office or Department at MAOF except contact for information, comments, etc., and they shall be emailed.

**9. Formal Communication:**

From the date of receipt of this RFP by each proposer and until a binding contractual agreement exists with the selected Contractor and all other proposers have been notified, or when MAOF rejects all proposals, all communication between MAOF and the proposers will be formal emails.

**10. Costs Incurred:**

The proposer's sole responsibility shall assume any costs incurred by proposers in preparing or submitting a proposal or subsequent oral presentation demonstration.

**11. Minority/Women-Owned Business Enterprises:**

Pursuant to Federal Acquisition Regulations and MAOF's procurement policy, MAOF may offer contracting opportunities to small and minority firms, women's business enterprises, and labor surplus area firms to the extent possible.

**12. Federal, State, and Local Taxes:**

MAOF is not exempt from State and federal taxes. Such applicable taxes shall be included in quoted prices, but also if any taxes are known to be borne by the Contractor to apply, they shall be shown separately. If not so shown, they shall be considered an expense of the proposer and deemed a part of the quoted prices.

**13. Payment Terms:**

Preferred invoice payment terms will be 30 calendar days from the date of invoice. If there is a discrepancy between the order and the invoice, payment terms shall be practical starting when the discrepancy is resolved. Monies due or to become due to the Contractor under the Contract may be retained by MAOF as necessary to satisfy any outstanding claim that MAOF may have against

the Contractor. At any time or times before final payment and three years thereafter, MAOF may have the Contractor's invoices or vouchers, and statement of cost audited.

**14. Indemnification:**

The Contractor shall indemnify, protect, defend, and hold harmless MAOF, its directors, officers, employees, and representatives from and against any claims arising from or connected with: (1) any alleged or actual breach by the Contractor or (2) any act or omission by the Contractor and only to the extent such claim arises by negligence or intentional misconduct or as may be allowed under applicable law. Monies due or to become due to the Contractor under the Contract may be retained by MAOF as necessary to satisfy any outstanding claim that MAOF may have against the Contractor.

**15. Insurance:**

Contractor shall, at all times, at its own expense, obtain and carry comprehensive liability insurance, including errors and omissions coverage, property damage insurance, and workers' compensation insurance in adequate amounts. The Contractor shall keep such insurance in full force for the duration and term of this Agreement. All certificates of insurance or evidence of insurance must contain a ten(10) business day written notice of any cancellation, change, or termination of coverage. The insurance required shall be obtained from the insurance company(ies) licensed to do business in the State of California and shall be kept in full force for 90 days after the last payment under the Contract.

- ✓ Workers' Compensation Insurance provides statutory limits in the State of California.
- ✓ Business Automobile Liability Insurance with a minimum of \$1,000,000 per occurrence.
- ✓ Commercial General Liability Insurance coverage with a minimum of \$1,000,000 per occurrence / \$2,000,000 aggregate limit. The Contractor shall provide immediate notice in the event there is any change of insurance or that it has reached the insurance limits due to claims made.

**16. RFP Addendum:**

In the event that it becomes necessary to revise this RFP, in whole or in part, an addendum will be posted on the MAOF website: <http://www.maof.org/procurement-department>.

**17. Completed Proposals:**

A proposer may submit no more than one (1) proposal in response to this RFP. The proposal shall be completed and signed by an individual who is authorized to bind the firm submitting the proposal.

**18. Withdrawal of Bids:**

At any time prior to the hour and date set for submitting proposals, a proposer may withdraw the proposal. This will not preclude another proposal's submission before the deadline for submitting the bid. After the scheduled time and date for submitting proposals, a proposer will be permitted to withdraw the bid if the award is delayed for a period exceeding 60 days.

**19. Receipt and Opening of Proposals:**

Proposers are responsible for ensuring their bid is delivered to MAOF by the scheduled date and time. Only those bids received promptly, as outlined in this RFP, will be considered. Proposals received after the date and hour designated are automatically disqualified and will not be considered; late bids will be dated, marked as received late, and placed unopened in the bid file. Proposers must pay particular attention to ensure the proposal is properly addressed. MAOF is only responsible if the proposal reaches the destination specified by the appointed date and time.

**20. Contract Award Notification:**

When the evaluation process of the proposals is completed, the selected proposer will be formally notified by mail or email. Other notifications will not be honored and should not be considered as a valid offer of award.

**21. By submitting a proposal:**

The proposer represents that:

- a. The proposer has read and understands the RFP and submits the response in accordance therewith.
- b. The proposer possesses the capabilities, equipment, and professional personnel necessary to provide an efficient and successful service as required by MAOF.
- c. The proposer has all the required licenses and insurance during the duration of the contract terms.
- d. The proposer is advised to become familiar with all conditions, instructions, and specifications of this RFP. By submitting a proposal, proposer represents and warrants that it has thoroughly examined and is familiar with work required under this RFP, that proposer has conducted such additional investigation as it deems necessary and convenient, that proposer can provide the services requested by the MAOF in a manner that meets the MAOF's objectives and specifications as outlined in this RFP, and that proposer has reviewed and inspected all materials submitted in response to this RFP. Once the consultant has been selected, a failure to have read the conditions, instructions, and specifications herein shall not be cause to alter the Contract or for proposer to request additional compensation.

**22. Other claims:**

No claim will be allowed for additional compensation or time for completion based on a lack of knowledge or lack of understanding of any part of the RFP.

**12.0 SERVICE LOCATION(S)**

**MAOF Headquarters  
401 N Garfield  
Montebello, CA 90640**

**EXHIBIT-A**  
**STATEMENT OF WORK (SOW)**  
**RFP 26-003 Centralized Intake & Case Management Implementation**  
**(Microsoft Dynamics 365)**

MAOF is soliciting proposals from qualified firms to design, configure, implement, and support a centralized **Intake and Case Management** solution using **Microsoft Dynamics 365 / Dataverse** (and related Microsoft Power Platform capabilities where appropriate). The solution will support consistent intake workflows, referral tracking, service status and waitlist management, client interactions and documentation, basic reporting, and enablement for MAOF staff.

**2) Project Objectives**

The selected vendor will help MAOF:

- Standardize and centralize intake and referral workflows across programs
- Improve visibility into service pipeline, status, waitlists, and outcomes
- Support secure, role-based access and improved data quality
- Enable staff adoption through structured training, documentation, and go-live support
- Provide initial reporting to support operations and compliance needs

**3) Scope of Work (Vendor Responsibilities)**

**A. Discovery, Design, and Delivery Approach**

Vendors must provide a structured implementation approach, including:

- Project kickoff, stakeholder alignment, and delivery plan
- Requirements validation and solution design workshops
- Iterative configuration with stakeholder demos and feedback cycles
- Testing support (SIT = System Integration Testing / UAT = User Acceptance Testing planning and execution support)
- Go-live readiness and stabilization support

**Required events:**

1. **Official Kick-Off Momentum Event (virtual acceptable)**
  - A formal kick-off event designed to build alignment and momentum.
  - Must include an intensive enablement component (e.g., half-day or full-day training/workshop) to accelerate adoption and prepare staff for upcoming change.
2. **Midpoint Leadership Check-In**

- A formal governance meeting at the project midpoint with MAOF leadership to review progress, risks, decisions, and confirm priorities for the remaining work.

## **B. Dynamics 365 / Dataverse Configuration – Intake & Case Management**

Vendors will configure Dynamics 365/Dataverse to support centralized intake and case management processes, including:

### **Core entities and workflows (minimum requirements):**

- Household/organization tracking as applicable (accounts or equivalent)
- Client/contact records and relationships
- Interest capture (pre-intake)
- Intake capture (full intake profile)
- Incoming referrals (internal + external referral tracking)
- Service status tracking (including progression)
- Waitlist status tracking
- Case/client interactions, activity tracking, and notes
- Document capture and storage approach (native and/or SharePoint integration)

### **Security & data quality (minimum requirements):**

- Role-based access control (at least 3 role profiles or equivalent)
- Configuring **duplicate detection rules** in D365/Dataverse (e.g., match on name + DOB, email, phone, address). Duplicate detection strategy and configuration (recommendation + implementation).

## **C. Digital Forms / Portal Experience (Power Platform)**

Vendors will implement web-accessible intake-related forms to support at minimum:

- Public/unauthenticated “Interest” submission
- Authenticated or code-based intake completion method (vendor to recommend best-fit)
- Secure document upload method aligned to intake/case record association

Vendors should specify their recommended approach (e.g., Power Pages, Power Apps, other) and justify it.

## **D. Integrations / Connectors**

Vendors will implement and/or configure:

- Outlook integration approach for staff productivity (e.g., email tracking, appointment integration, contact sync as applicable)
- SharePoint integration approach for document management and retention

## **E. Reporting (Baseline Deliverables + Rationale)**

Vendors will provide initial reporting support including:

- A reporting discovery/design workshop
- Delivery of **up to four (4) baseline operational/compliance reports** built in native Microsoft tooling suitable for MAOF users
- Export capability to **CSV and PDF** (or comparable outputs)

### **Rationale for “up to four” baseline reports:**

MAOF intends to prioritize a high-value starter set to ensure adoption and minimize rework while workflows and data standards stabilize during implementation.

### **Example baseline report (vendors may propose alternates):**

- “Intake Pipeline & Service Status”: track intake volume, referral sources, current status, waitlist metrics, and staff assignment.

Vendors must include an example list of proposed baseline reports and explain how they will prioritize them with MAOF.

## **F. Data Migration Support (Planning + Enablement)**

Vendors will provide migration planning support including:

- Data mapping approach from MAOF legacy sources into Dataverse/D365
- Migration strategy, cleansing recommendations, and validation approach
- Training for MAOF staff on migration procedures (train-the-trainer is acceptable)

Vendors must clearly state what migration execution is included vs. excluded.

## **G. Training, Documentation, and Change Enablement**

### **Training and Support (Required)**

The selected vendor shall provide a structured training, documentation, and post-go-live support program to ensure adoption and successful transition for both administrators and end users.

### **A) Administrator and Technical Training (Required)**

Vendor shall provide the following baseline administrator/technical enablement:

- **Train-the-Trainer:** Lead **two (2) sessions, two (2) hours** each, for MAOF designated trainers/super users.
- **Administrator Training:** Lead **two (2) sessions, two (2) hours** each, for MAOF system administrators covering security, configuration basics, user management, and ongoing maintenance.
- **Go-Live / Rollout Support:** Provide up to **twenty (20) hours** of go-live and rollout support delivered over **four (4) weeks** following go-live. Support activities may include triage, issue resolution coordination, and stabilization guidance.

**Vendor proposal must include:** training agendas, learning objectives, and the format (live/virtual), plus any prerequisites for trainees.

## **B) Staff (End User) Training and Support (Required)**

Vendor shall provide end-user training, documentation, and guided support as follows:

- **End User Documentation & Training Materials:** Provide up to **forty (40) hours** of end-user enablement content development, which may include:
  - Recorded training videos
  - Quick reference guides / job aids
  - Step-by-step process guides aligned to MAOF workflows
- **Live End User Training:** Deliver up to **eight (8) live training sessions**, each **two (2) hours** in length, for end users. Sessions may be role-based (e.g., intake staff, case managers, supervisors) and recorded when feasible.
- **Office Hours / Adoption Support:** Provide up to **forty (40) hours** of office hours support for “how-to” questions and general user support. Office hours may be offered virtually in scheduled blocks with a defined intake method (e.g., office hours calendar + queue).

**Vendor proposal must include:** recommended training sequence (relative to go-live), how training will be tailored by role, and how office hours will be staffed and managed.

### **Training Deliverables (Minimum)**

Vendors must deliver, at minimum:

- Training plan and schedule aligned to implementation timeline
- Training session agendas and materials
- End-user documentation artifacts (guides/videos as applicable)
- Office hours plan (schedule, format, and support boundaries)
- Knowledge transfer summary for MAOF administrators and designated trainers

## **H. Go-Live and Post-Go-Live Support**

Vendors must include:

- Go-live readiness checklist and cutover plan
- Hypercare/stabilization support post-launch (vendor to propose duration and coverage)
- Defect triage and resolution approach

## **4) Deliverables (Minimum)**

At minimum, the selected vendor will deliver:

- Project plan and governance cadence
- Configured D365/Dataverse intake & case management solution (per scope)
- Forms/portal experience for interest + intake + document upload

- Outlook and SharePoint integration configuration approach
- Up to 4 baseline reports + report documentation
- Data migration plan and mapping artifacts
- Training sessions + training materials
- Admin documentation and handoff
- Go-live plan + stabilization support plan

### **5) Proposal Requirements (What Vendors Must Submit) -**

**To be considered responsive, a proposal must contain the following, referenced by number and in the order below:**

Vendors must include:

1. A brief description of the history and organization of the bidder's firm, and of any proposed subcontractor.
2. A statement that business licenses, professional certifications or other credentials necessary for the performance of the services here sought are in place, together with evidence that bidder, if a corporation, is in good standing and qualified to conduct business in California.
3. A description of similar projects completed by the bidder within the past two (2) years.
4. Qualifications, background and experience of staff proposed to work on the project.
5. Proposer Cover Sheet (Appendix A – Vendor Identification)
6. Rate Worksheet (Exhibit B)
7. Implementation approach and timeline (with phases)
8. Staffing plan (roles, responsibilities, availability)
9. Relevant experience (especially D365/Power Platform + human services/intake)
10. Proposed technical architecture and licensing assumptions (if any)
11. Change management and training plan
12. Reporting plan + sample baseline reports
13. Migration strategy and responsibilities matrix
14. Risk register (top risks + mitigations)
15. A detailed description of bidder compensation formula, including any travel costs and other expenses. Bidders must submit a sample of a breakdown of charges and costs, detailed by job function/title of those servicing, as well as a maximum not-to-exceed total for all services. All travel, lodging and miscellaneous support costs are to be included in this billing rate. Invoices for services satisfactorily

performed must be itemized by date and services performed and reference. As the MAOF may award a contract based on the initial offer, a bidder should make its initial offer on the most favorable terms available. The MAOF reserves the right, however, to have discussions with those bidders falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.

16. References with contact information from organizations that have used bidder's services for similar projects/type of work within the last 12-18 months.

## **6) Change Management (Required)**

The selected vendor shall provide structured change management support to help MAOF drive adoption, reduce resistance, and sustain process improvements throughout implementation and rollout.

### **A) Leadership & Stakeholder Change Sessions**

Vendor shall:

- Lead four (4) one-hour change management sessions with MAOF leadership and key stakeholders to identify:
  - Current change priorities
  - Stakeholder readiness and concerns
  - Potential adoption blockers and risks
  - Critical messages and change impacts by role/program

### **B) Findings and Recommendations**

Based on leadership/stakeholder discussions (and any agreed interview approach), vendor shall:

- Provide a summary of recommendations and findings, including key risks, readiness themes, and mitigation actions.
- Provide recommendations for:
  - Establishing a change team / change champion network (structure, roles, cadence)
  - A practical communications plan for the initiative (audiences, key messages, channels, timing)

### **C) Ongoing Participation in Project Governance**

Vendor shall:

- Participate in biweekly status checkpoint meetings for the duration of the project to ensure change management remains aligned to implementation milestones and adoption needs.

### **Change Management Deliverables (Minimum)**

Vendors must deliver, at minimum:

- Change management session agendas and facilitation
- A written findings/recommendations brief (readiness themes, blockers, mitigations)
- Proposed change team structure and operating cadence

- Draft communications plan (high-level roadmap and messaging recommendations)

## **7) Vendor Evaluation Criteria (Sample Scoring Rubric)**

MAOF will evaluate proposals using the following criteria (sample weighting shown — adjust as desired):

### **A. Relevant Experience & Past Performance – 20%**

- Demonstrated success implementing D365/Dataverse/Power Platform solutions
- Experience with intake/case management workflows, human services, nonprofit environments
- Quality of references and comparable project outcomes

### **B. Technical Approach & Solution Fit – 20%**

- Soundness of proposed architecture and configuration approach
- Security, privacy, role-based access, and data governance approach
- Practicality and maintainability for MAOF (admin usability)

### **C. Implementation Methodology & Project Management – 15%**

- Clarity of project plan, cadence, governance, and decision-making framework
- Inclusion of required events: kickoff momentum event + midpoint leadership check-in
- Risk management and ability to meet timelines

### **D. Training, Change Enablement, and Adoption Plan – 15%**

- Quality and realism of training plan (end-user + admin)
- Change management strategy and adoption support
- Documentation quality and handoff approach

### **E. Reporting & Analytics Approach – 10%**

- Ability to deliver prioritized baseline reporting (up to 4) and explain rationale
- Report usability and alignment to operational/compliance needs
- Expandability roadmap for future reporting

### **F. Data Migration Strategy – 10%**

- Quality of migration planning, mapping approach, validation, and data quality plan
- Clarity of MAOF vs vendor responsibilities

### **G. Cost and Value – 10%**

- Total cost, transparency, and pricing structure
- Clear identification of optional services and assumptions

### **Optional (if MAOF will conduct demos): Vendor Demonstration – add 10%**

- Workflow demonstration quality and alignment to MAOF use cases

## **8) Optional: Required Vendor Demo Scenarios (Highly Recommended)**

MAOF may require finalists to demo:

1. Interest → Intake → Referral → Service Status progression
2. Waitlist workflow and reporting visibility
3. Document upload tied to a client/intake record
4. Role-based access differences between two user roles
5. “Intake Pipeline & Service Status” report output/export

MAOF may propose additional tasks as deemed necessary to complete the assignments. Any extra work shall be compensated as agreed upon in the FIRMS Contract with the MAOF.

**EXHIBIT-B  
RATE WORKSHEET**

**RFP 26-003 Centralized Intake & Case Management Implementation  
(Microsoft Dynamics 365)**

**(Must be completed and returned to MAOF)**

1<sup>ST</sup> YEAR: \_\_\_\_\_ .00

2<sup>ND</sup> YEAR: \_\_\_\_\_ .00

3<sup>RD</sup> YEAR: \_\_\_\_\_ .00

**NOTE:** The price shall remain firm and fixed for three (3) years. The Contract (hourly, daily, monthly, Unit Rate, etc.) rate after 3-year terms may be adjusted annually based on the increase or decrease in the U.S. Department of Labor, Bureau of Labor Statistics' Consumer Price Index (CPI) for the Los Angeles-Riverside-Orange County Area for the most recently published percentage change for the twelve (12) month period preceding the Contract anniversary date, which shall be the effective date for any cost of living adjustment.

**APPENDIX – A**  
**VENDOR IDENTIFICATION**

**RFP 26-003 Centralized Intake & Case Management Implementation  
(Microsoft Dynamics 365)**

(Must be completed and returned to MAOF)

<b>Firm/Individual's Name:</b>			
<b>Doing Business As (DBA):</b>			
<b>Company Federal ID# or Social Security No.:</b>			
<b>Address:</b>			
<b>Remit To Address:</b>			
<b>Telephone:</b>			
<b>Fax:</b>			
<b>Email:</b>			
<b>Web address:</b>			
<b>Main Contact Person:</b>			
<b>Person responsible for response (if different):</b>			
<b>Print Name</b>	<b>Title</b>	<b>Authorized Signature</b>	<b>Date</b>

**APPENDIX – A**  
**INTENTIONALLY BLANK**

**RFP 26-003 Centralized Intake & Case Management Implementation  
(Microsoft Dynamics 365)**

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