Microsoft Dynamics 365 CRM for Student Engagement

REQUEST FOR PROPOSAL

Project No. ITS-008-25

INFORMATION TECHNOLOGY SERVICES

February 25, 2025

INTRODUCTION:
The Boston Public Health Commission (BPHC), through its Information Technology Services office, invites qualified Software Implementation vendors to submit proposals for the implementation of Microsoft Dynamics 365 CRM to enhance student engagement at the Community Health Education Center (CHEC). This initiative aims to strengthen our ability to support and develop Community Health Workers (CHWs) who serve Boston's diverse communities.

BACKGROUND:
The Community Health Education Center (CHEC) stands as a cornerstone institution in Boston's public health infrastructure, providing essential training and professional development services to Community Health Workers. These CHWs serve as vital bridges between healthcare services and Boston's multicultural communities, delivering crucial outreach and health education services to residents across the city.

Request for Proposal (RFP) Schedule	
Monday, February 25th, 2025	RFP to be published in The Boston Globe.
	RFP available at 2:00 PM ET at www.boston.gov/bid-listings.
Monday, March 10th, 2025	Vendor questions due by 5:00 PM ET via email to RFR@bphc.org. Each vendor should consolidate questions into a single, emailed submission with the email subject being "Microsoft Dynamics 365 CRM for Student Engagement RFP Questions." BPHC will not respond
Friday, March 14th, 2025	BPHC responses to Vendor questions posted by 5:00 PM ET at www.boston.gov/bid-listings.
Monday, March 31st, 2025	Vendor RFP submissions due by 5:00 PM ET via email to RFR@bphc.org with the email subject being "Microsoft Dynamics 365 CRM for Student Engagement RFP Response." BPHC will not

NOTE: This is the anticipated schedule. While it is BPHC's intention to follow this schedule and conduct activities in a timely manner, unforeseen circumstances may arise that can affect it. If the BPHC needs to make schedule changes, it will release that updated schedule as an amendment to this RFP at www.boston.gov/bid-listings.

Certified Underrepresented Businesses Enterprise Participation

As part of BPHC's efforts to have an equitable procurement process, BPHC encourages the participation of Supplier Diversity Office of Commonwealth of Massachusetts Certified Underrepresented Businesses Enterprise (CUBE) businesses, which includes: Minority-owned Business Enterprises (MBE), Women-owned Business Enterprises (WBE), Veteran-owned Business Enterprises (VBE),Disability-owned Business Enterprise (DOBE), Lesbian Gay Bisexual Transgender Business Enterprises (LGBTBE), Minority Non-Profit(MNPO), Women Non-Profit (WNPO), Minority Women Non-Profit (MWNPO) and local businesses.

Public Records Laws

Certain records and documents created or received in connection with this RFI may be subject to public disclosure under applicable Public Records Laws, including but not limited to M.G. L. c. 4, § 7(26) and 950 CMR 32.00. Therefore, BPHC may be required to disclose records pursuant to Public Records Law, and as such, BPHC will use reasonable efforts to identify and label any information they believe to be proprietary or confidential prior to disclosure.

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Background Information

The Boston Public Health Commission (BPHC), through its Information Technology Services office, invites qualified Software Implementation vendors to submit proposals for the implementation of Microsoft Dynamics 365 CRM to enhance student engagement at the Community Health Education Center (CHEC). This initiative aims to strengthen our ability to support and develop Community Health Workers (CHWs) who serve Boston's diverse communities.

Overview of BPHC

BPHC is the local public health department for the City of Boston and the country's oldest health department. BPHC's mission is to work in partnership with communities to protect and promote the health and well-being of all Boston residents, especially those impacted by racism and systemic inequities.

All service contracts awarded by the Boston Public Health Commission may be subject to following the City of Boston's living wage ordinance. This ordinance requires that all employees working on sizable city contracts earn an hourly wage that is enough for a family of four to live at or above the federal poverty level. This wage amount called the living wage, is recalculated every year. For more information, please visit https://www.boston.gov/worker-empowerment/living-wage-division.

BPHC's Pursuit of Microsoft Dynamics 365 CRM for Student Engagement

Strategic Context and Need

The Boston Public Health Commission's pursuit of Microsoft Dynamics 365 CRM comes at a critical juncture in public health history. The convergence of multiple public health challenges has created an unprecedented need for enhanced systems and capabilities to support our Community Health Workers (CHWs) and the communities they serve.

Current Challenges and Growing Demands

Boston's public health landscape has become increasingly complex, characterized by:

Multiple Concurrent Public Health Crises

- Ongoing management of COVID-19 and emerging infectious diseases
- Escalating mental and behavioral health needs across all demographics
- Persistent and growing opioid epidemic
- Increasing strain on healthcare delivery systems
- Widening racial and ethnic disparities in health outcomes
- Rising cost of living impacting access to basic healthcare needs

Operational Constraints

Despite these mounting challenges, CHEC's operational capabilities have remained largely unchanged since pre-COVID levels, primarily due to:

- Competing organizational priorities
- Limited technological infrastructure
- Resource constraints
- Increased demand for services without corresponding capacity expansion

Impact on CHEC Operations

The current situation has created significant operational challenges:

1. Growing student waitlists for essential training programs
2. Difficulty in tracking and supporting student progress effectively
3. Limited ability to respond rapidly to emerging community health needs
4. Challenges in coordinating multi-lingual training programs
5. Reduced capacity for individualized student support
6. Inefficient data collection and reporting processes

Strategic Solution: Microsoft Dynamics 365 CRM

The implementation of Microsoft Dynamics 365 CRM represents a critical strategic initiative to:

Enhance Operational Efficiency

- Streamline student enrollment and tracking processes
- Automate routine administrative tasks
- Improve resource allocation and program management
- Enable data-driven decision making

Strengthen Community Impact

- Better match CHW training to community needs
- Improve tracking of program outcomes and community impact
- Enable rapid response to emerging public health challenges
- Support multilingual and multicultural program delivery

Build Future Resilience

- Create scalable systems for future growth
- Establish flexible infrastructure for evolving needs
- Enable remote and hybrid learning capabilities
- Improve data analytics for strategic planning

Expected Outcomes

The implementation of Microsoft Dynamics 365 CRM will enable CHEC to:

1. Increase training capacity without proportional increase in administrative burden
2. Improve student engagement and completion rates
3. Enable better tracking of community health impact
4. Support data-driven program improvements
5. Enhance coordination with community partners
6. Strengthen reporting capabilities for stakeholders

This strategic initiative represents a critical step in modernizing CHEC's infrastructure to meet current and future public health challenges, ultimately supporting BPHC's mission to protect and promote the health and well-being of all Boston residents.

Statement of Work

Introduction

BPHC recently purchased several Dynamics 365 Customer Engagement licenses, with the goal of leveraging D365 CE to support management of their Student Engagement processes for the Community Health Education Center (CHEC).

Project objectives and scope

1. *Objectives*

The primary goal of this project is to provide the Boston Public Health Commission's Community Health Education Center (CHEC) with a delivery team to implement an MVP release of Dynamics 365 Customer Service configured to support CHEC's student relationship management requirements.

2. *Areas in scope*

2.1 General project scope

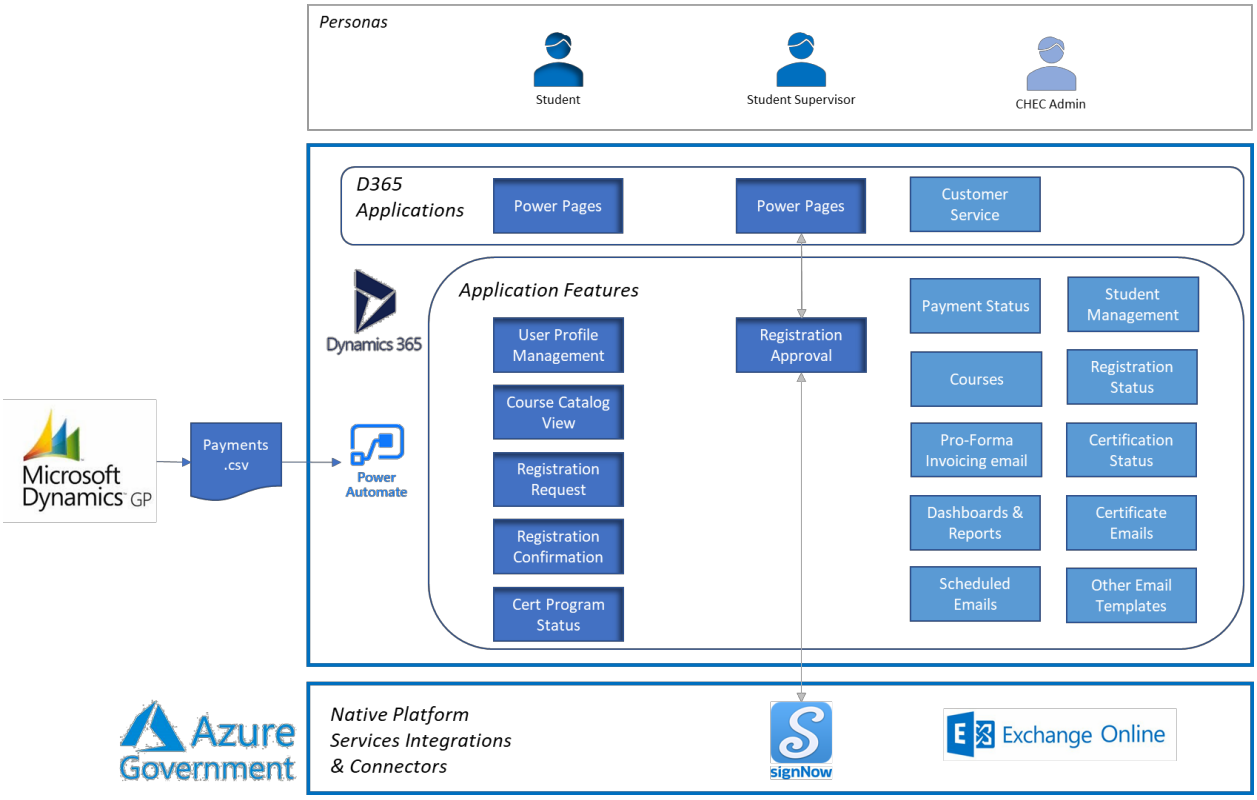
This engagement makes use of a capacity-based agile delivery model. Vendor will provide CHEC with a delivery team staffed as defined in the Project staffing section and the ESWO. The delivery team will follow recommended agile practices (described further in the Scrum approach section) as Vendor collaborates with CHEC to deliver a foundational student relationship management solution. The delivery team will work with Customer product owner who will define product features, scope of functionality to be delivered.

The project may address the following scope areas which may be revised at any time based on direction from CHEC. There may be additional scope not listed in the following list that may be delivered, as well as scope listed that is prioritized low enough that it may not be built due to capacity constraints.

By nature of agile delivery, scope is variable. When the resource labor category, capacity and/or duration of the delivery team needs to be amended to deliver the agreed backlog items, the change management process will be triggered to allow the project to change the available resources and/or capacity.
Alternatively, Customer may decide to reduce the scope to remain within its budget. This approach allows the Customer to continually adapt the scope and direction of the solution.

Area	Description	Assumptions
Customer Service Core Implementation	• Application Installation • D365 Data Model extensions for classes, certification collections, and student enrollment. • Process Automation • UI including Views and Forms • Customer Service Dashboard(s) • Extended course attributes • Registration requests &	• Vendor will utilize the core Customer Service Data Model and UI as a baseline for implementation. • Process modeling is limited to the course scheduling request and approval process for MVP • D365 is not intended as a replacement for Moodle functionality.
Data Imports	• Courses • Students / Contacts	• One-Time Import only. Files will not exceed 10,000 records.
Integration	• Payment status csv file from Dynamics GP (on- premises) • SignNow for course request approvals	• CHEC is responsible for providing import files in .csv format • CHEC will provide FTP server or other file drop location. • Files must contain unique student and class identifiers.
Student & Approver Portal	• Power Pages enablement • Course registration requests and status • Supervisor approvals in PowerPages leveraging SignNow • UI/UX design consulting • Accessibility design	• Portal functionality will be limited to course review and approval request process • Power Pages will be stand-alone linked out or fully embedded. Full integration to the CHEC website is not in scope for this phase. • UI/UX scope is limited to design only and is time-boxed to 160 hours. • Accessibility scope is limited to design only and is time-boxed to 160 hours.

The following diagram provides a conceptual representation of the technology approach and target capabilities for this engagement.



2.2 Software products and technologies

The products and technology that are listed in the following table are required for the project. The Customer is responsible for obtaining all identified licenses and products.

Product and technology item	Version	Responsibility	Ready by
Microsoft Dynamics 365 CE (Customer Service)	Cloud	CHEC	Start of project
Azure Dev Ops Subscription	Cloud	CHEC	Start of project
SignNow (Subscription)	Latest	CHEC	Start of project

Environments

All environments used for integration, preproduction, and production use of the developed software, supporting systems, and delivery lifecycle will be supplied and maintained by the Customer.

The Customer will provide an Azure subscription. The Customer will also provide Vendor with administrative control to build the development and test environments.

The following environments will be required to deliver the project.

Environment	Location	Responsible for configuration and maintenance	Subscription Ownership	Ready by
Development	Microsoft D365 Cloud	Vendor	CHEC	Project start
Test	Microsoft D365 Cloud	Vendor	CHEC	Project start
Build	Microsoft D365 Cloud	Vendor	CHEC	Sprint 2
User Acceptance Testing (UAT)	Microsoft D365 Cloud	Customer	CHEC	Prior to UAT start date
Production	Microsoft D365 Cloud	Customer	CHEC	Prior to Deployment

2.3 Testing and defect remediation

Test environment shall be discussed during engagement baseline planning as they might impact the estimates and therefore the capacity.

2.4 Testing

The following kinds of testing are included in the scope of the project and will be applied where appropriate and for components delivered by Vendor:

Test type (environment)	Description	Responsibility		
		Has responsibility for testing?	Provides test data and test cases	Provides guidance and support
Unit Test	Tests that cover a single component executed by the developer or configuration specialist to verify that the functionality unit is functioning as expected.	Vendor	CHEC	CHEC
End-to-end system tests	[Preference is to limit contractual testing to what is in this table. Other test types	CHEC	CHEC	Vendor

Test type (environment)	Description	Responsibility		
		Has responsibility for testing?	Provides test data and test cases	Provides guidance and support
	should emerge from Customer discovery. If required by Customer, additional test types may be added here.]			
User Acceptance Test	Tests the user functionality of key real-world scenarios. UAT will be conducted over the course of the project according to the UAT timeframes agreed upon during Engagement baseline planning (as described in the Engagement baseline planning section). Feedback from UAT (defects or new user stories) and other backlog items will be prioritized in the product backlog.	CHEC	CHEC	Vendor

2.5 Defect remediation

If defects are identified during delivery, the priority of the item will be jointly agreed upon by the Customer and Vendor. Defect prioritization is defined in the following table.

Priority	Description	Remediation in scope?
P1	**Blocking defect** Development, testing, or production launch cannot proceed until this type of defect is corrected. A defect of this type blocks further progress in this area. The solution cannot ship, and the project team cannot achieve the next milestone until such a defect is corrected.	Yes, if prioritized in the backlog by your product owner and within the capacity.
P2	**Significant defect** This type of defect must be fixed prior to moving to production. Such a defect, however, will not affect test plan implementation.	Yes, if prioritized in the backlog by your product owner and within the capacity.
P3	**Important defect** It is important to correct this type of defect. However, it is possible to move forward into production through the use of a workaround.	Yes, if prioritized in the backlog by your product owner and within the capacity.

Priority	Description	Remediation in scope?
P4	**Enhancements and low priority defects** P4 defects consist of feature enhancement and cosmetic defects. These include design requests that vary from original concepts.	Yes, if prioritized in the backlog by your product owner and within the capacity.

All work resulting from defects will be planned in the product backlog alongside new feature development. Defects will be added to the product backlog as backlog items. Defects and other backlog items will be prioritized by the Customer product owner and added to future sprints.

If P1 or P2 defects are found in the UAT environment, the delivery team will collaborate with the product owner to determine whether the defect should be fixed immediately. The delivery team will inform the product owner about the potential impact a defect fix could have on the current sprint. Some backlog items might need to be deferred from the current sprint to the product backlog in order to accommodate the work required to fix the defect. The delivery team and the product owner will together determine what needs to be deferred from the current sprint, if anything.

3. Areas out of scope

Any area not explicitly included in the section is out of scope for Vendor during this engagement. Areas out of scope for this engagement are listed in the following table.

Area	Description
Product licenses and subscriptions	Product licenses (Microsoft or non-Microsoft) and cloud service subscriptions are not included.
Hardware	Vendor will not provide hardware for this project.
Client	Deployment and configuration of client software is out of scope for the project.
Commercially available Third Party Software	Activities where Vendor would be designing, configuring, integrating, deploying or fixing issues in commercially available 3rd Party software (excluding Open Source)
Data Cleansing	Data Cleansing activities are not in scope for this project.
Data migration	Data migration of large data sets (in excess of 10K records) are not in scope for this project.
System modifications	Modifications to commercially available 3rd party systems and/or external interfaces to support integration are not in scope for this project.

Area	Description
Product bugs and upgrades	Product upgrades, bugs, and design change requests for Microsoft products are not in scope for this project.
Process reengineering	Redesign or re-engineering of the Customer's business processes is not included.
Organizational change management	Designing—or redesigning—the Customer's functional organization is not included.
End-user communications	Planning or undertaking of end-user communications is not in scope.
Training	Formal user training or the creation of training materials is not in scope.
Deployment, installation, configuration, and testing of other systems	The following items are not included: • Installation and configuration of server hardware or network resources. • Installation, configuration, and testing of non-Microsoft software other than software identified as within scope. • Testing and configuration of applications and services outside of those required to support the deployment of the solution. • Troubleshooting or remediation of existing network and storage systems.
Other Testing	• Testing and configuration of applications and services outside of those required to support the deployment of the solution are not in scope. • Accessibility testing is not in scope. • Performance Testing is not in scope. • Automation Testing is not in scope.
Network and storage	• Troubleshooting or remediation of existing network and storage systems is not in scope.

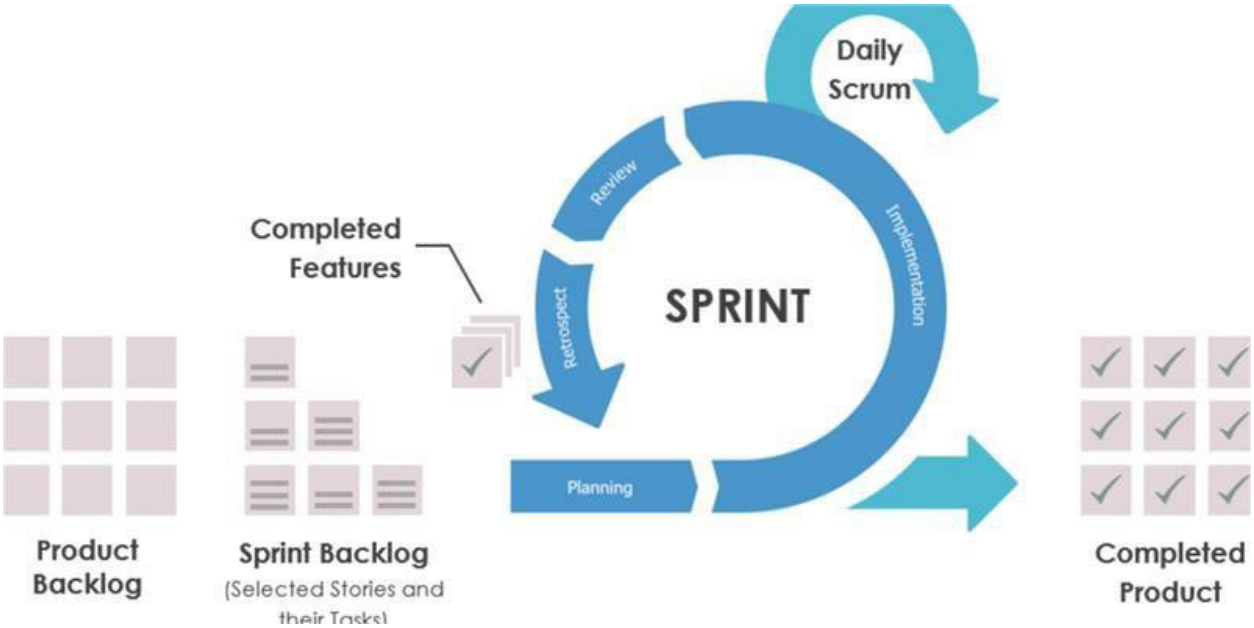
Project Approach

Scrum approach

1. *Sprint process*

Vendor will undertake an iterative development approach that is based on a fixed capacity, fixed duration, variable-scope process known as the scrum process (http://scrumguides.org). The key tenets are as follows:

- Joint ownership of decisions on the product backlog.
- Short implementation units (sprints).
- Prioritization of business objectives in a product backlog.
- Time-bound planning for each sprint.
- Emphasis on the remaining work.
- Sprints that produce a working solution.
- Sprint demonstrations that are time-restricted and have regular checkpoints.
- Regular retrospective meetings that may be used for course correction.



Requirements will be captured in the form of personas, user journeys, epics, features and user stories o some combination of these depending on the breadth and complexity of the solution.

Personas describe the roles of the people using the system.

User journeys are simple descriptions of the work processes currently done by the personas, as well as desired future process changes. User journeys are optional and may be created during or after Engagement baseline planning workshop to gain clarity on complex workflows.

User stories are work items in the product backlog. They have the following elements, at a minimum:

- A single persona who is the primary stakeholder in the outcome of the user story
- A simple description of what the system should do
- A simple description of the value of the result
- A set of acceptance criteria that define when the user story is complete

Optionally, wireframe documents may also be created to supplement user stories if the application requires a high degree of user interface design.

A feature is a higher-level, more abstract description of what the system should do. The sole purpose of features is to categorize user stories. Epics are more abstract than features. The sole purpose of epics is to categorize features. Features and epics are optional and may be used to help organize a large number of user stories.

At the end of each sprint the customer Project Manager and Vendor Project Manager will review the consumption against the total capped capacity to determine if adjustments need to be made through the change request process.

2. *Engagement initiation*

At the beginning of the project, the following prerequisites must be completed. These tasks must be completed before Engagement Baseline Planning.

Category	Description
Vendor activities The activities to be performed by Vendor	• Conduct a preinitiation call or meeting to initiate team formation and communicate expectations. • Document the project launch prerequisites using input from this SOW. • Track the status of launch prerequisites and adjust the engagement initiation phase start date accordingly. • Conduct a detailed walk-through of the SOW with the Customer to agree upon an initial project schedule and approach. Onboarding of staff onto client environment.
Customer activities The activities to be performed by the Customer	• Attend and participate in the preinitiation call. • Assign project initiation and launch prerequisites responsibilities to accountable Customer leadership and establish target completion dates. • Complete the project initiation and launch prerequisites. • Staff the project with the required Customer resources in the time frames agreed upon in the preinitiation call. • Assist with any onboarding requirements for Vendor to be able to start Engagement Baseline Planning.

3. *Engagement Baseline Planning*

The engagement baseline planning will be **2-5 days** in length and will occur at the beginning of Sprint 1.

At the completion of the *engagement baseline planning* the product backlog, assumptions, and dependencies will be verified. Should there be any material deviations from the initial estimated capacity, these and their implications will be reviewed and evaluated in terms of potential impact to the project.
Potential impacts may include timeline, resource and skills requirements, and overall cost. The impact of such changes will be addressed through the Change Management process. If additional resources are required standard staffing lead times will apply.

Category	Description

Vendor activities The activities to be performed by Vendor	• Facilitate a workshop through all-day meetings with the Customer.
	  ○ Review the business goals and objectives.
	  ○ Collaborate with the Customer to refine or baseline:
	  ▪ A problem statements.
	  ▪ Vision statements.
	  ▪ Personas.
	  ▪ User stories for the product backlog.
	• Create an initial list of non-functional requirements, such as performance and scalability need.
	• Develop a recommended high-level data architecture.
	• Help prepare the development environment.
	• Set up Application Lifecycle Management (ALM) and Azure DevOps that include building, releasing, and deploying a shippable increment.
	• Collaborate with the Customer on an estimated release plan based on the initial backlog of user stories.
	• Collaborate with the Customer product owner to create a proposed scope for the first release, including a set of user stories that are ready for sizing, design, and development.
	• Provide coaching to help the product owner manage the product backlog.
	• Based on the release plan, define the environment quantification needs per type
	• Identify impediments to efficient development, including areas that require more elaboration, like proofs of concept or other architectural discovery tasks.
	• Collaborate with the Customer to create a Definition of Ready, which is the criteria that determines when a user story that is ready to be developed.
	• Collaborate with the Customer to create a Definition of Done, that is, what constitutes completed user stories. That criteria will be used by the team to decide when a story is complete.
	• Define a test strategy and plan for all in-scope testing defined in the Testing and defect remediation section. If additional testing is

Category	Description
	determined as necessary during engagement baseline planning, it may be added following the change management process. • Re-evaluate the estimate of effort after detailing user stories to compare with original estimate and trigger Change Request process, as necessary. • Explore external dependencies. • Create a risk list. • Collaborate with the customer to define a supportability plan with transition to support and operations quality gates. • Collaborate with the customer to reassess the original established capacity in light of the refined product backlog. • Validate and conduct feasibility check of security procedures and policies identified by the customer during engagement baseline planning
Customer activities The activities to be performed by the Customer	• Identify and assign a product owner who is empowered to make business prioritization and product features decisions and act as a single point of contact for requirements questions. • Attend and participate in the workshop sessions. • Help define user stories. • Provide updated background information, documentation, and business requirements. • Identify Customer team members who will be available for the duration of the project. • Clarify requirements as needed. • Help prepare the development environment, where necessary. • Collaborate with Vendor to create a proposed scope for Sprint 1. • Provide help removing any impediments. • Define a UAT process. • If the solution will use open source software, identify required approval processes and policies for using open source. • Identify all security procedures and policies that the Vendor Team must comply with.
Key assumptions	• Customer representatives (especially the product owner) will be available throughout the duration of the workshop. • The product backlog will be refined during engagement baseline planning, which may result in changes to overall scope and changes to required capacity. • The product backlog is refined on a weekly basis or on a need basis, but the start of development activities of a given item are locked 2 weeks prior to development start date. • Vendor will use an industry standard estimation tool and process.

4. *Delivery sprints*

Each delivery sprint will last **three (3)** weeks. The final duration for sprints will be determined in collaboration with the Customer during Engagement Baseline Planning.

Before sprint planning starts, the Customer product owner will collaborate with Vendor to create a proposed sprint backlog. This sprint backlog will consist of a set of product backlog items that Vendor and the product owner estimate may be completed during the sprint.

The first day of every sprint will be set aside for Sprint Planning for that sprint. (In some exceptional cases, sprint planning may extend past the first day.) The Vendor delivery team and the Customer product owner will attend. The Vendor team will lead the meeting, and the following activities will take place:

- Each user story will be reviewed by the Vendor delivery team. The Vendor delivery team will determine if there is sufficient information to begin delivery. The Vendor team might seek clarification from the Customer Product Owner. If there is insufficient information to develop a story and the Product Owner cannot provide clarification during the meeting, the story might be deferred to a later sprint or the product backlog by the Vendor delivery team.
- The Vendor delivery team will determine which user stories can be accomplished during the sprint. If the proposed scope is too large, the team will collaborate with the Customer Product Owner to defer stories to a later sprint or the product backlog. If the proposed scope is too small, the team will collaborate with the Customer Product Owner to add user stories. The user stories selected for the sprint are solely determined by the Vendor delivery team.
- The Vendor delivery team will determine the technical feasibility of a user story. If the technical feasibility of a user story requires further investigation, a corresponding backlog item might be added to investigate potential solutions. If the Vendor delivery team determines that a user story is not feasible, the story can be removed from the backlog by the Vendor delivery team.
- The Vendor delivery team will work to decide how the work will be accomplished. This might include design discussions, updates to the architecture, and a breakdown of user stories into tasks.

During the sprint, the delivery team will build out the solution with planned user stories and architecture, which will be updated, if it is required. Daily standup meetings will be performed by the delivery team to keep everyone informed and to report any impediments.

During the sprint, if the Vendor delivery team determines that a backlog item cannot be completed within the sprint duration, it will be deferred to a later sprint after consultation with the team and the Customer product owner. If the delivery team has extra capacity in a sprint, the delivery team will collaborate with the product owner to select backlog items to be added to the sprint scope. Vendor is the sole decision maker on scope changes once the sprint has started.

The last day of the sprint is usually dedicated to demonstrating the functionality that has been achieved in the sprint and to carrying out a retrospective of the sprint.

Category	Description

Vendor activities The activities to be performed by Vendor	• Review the user stories assigned to a Sprint.
	• Vendor Delivery team will determine whether sufficient information is available for each user story or not. A user story will be flagged if more clarification is needed and unless properly understood it may be decided to defer the user story to later sprints.
	• The Vendor Delivery team will determine whether the user stories assigned to a Sprint can all be completed within that Sprint or not based on the available capacity and inter-dependencies across user stories.
	• Vendor Delivery team will work collaboratively to design and plan for the implementation of the user stories.
	• The Vendor Delivery team will write and execute automated tests.
	• Conduct and participate in daily scrum meetings.
	• Collaborate with the Customer product owner to create a proposed scope for future Sprints, including a set of user stories that are ready for sizing, design, and development.
	• Provide coaching to help the product owner manage the product backlog.
	• Identify impediments to development progress.
	• Continuous refinement of the effort estimate (effort remaining) of user stories based on the progress of the development, dependencies and architectural constraints/needs.
	• Explore external dependencies.
	• Review and refine the risk list.
	• Continuous collaboration with the customer to reassess the remaining resource capacity considering the progress of development, refined product backlog and clarity on the requirements.
	• At the end of a Sprint following activities will be conducted:
	  ○ **Capacity Burndown**: Vendor team will review along with customer Project Manager, the consumed capacity relative to the total capacity burndown of the project.
	  ○ **Sprint review:** A sprint review meeting is a single meeting held at the end of the sprint to inspect the increment and adapt the product backlog if needed. The Customer product owner (mandatory) and Customer stakeholders (optional) but recommended) will attend (see Delivery sprint completion section for details).
	  ○ **Sprint retrospective:** The sprint retrospective is an opportunity for the scrum team to inspect itself and determine if there are any improvements that need to be enacted during the next sprint.

Category	Description
Customer activities The activities to be performed by the Customer	• Attend and participate in Daily scrum meetings. • Help refine user stories and provide timely clarifications. • Provide updated background information, documentation, and business requirements. • Collaborate with Vendor to create the proposed scope for future Sprints. • Provide help removing any impediments. • Conduct User Acceptance Testing on completed Backlog Items according to the UAT cycle defined in the release plan. • Attend the Sprint review meetings and confirm whether completed user stories are delivered (see Delivery sprint completion section for details).
Key assumptions	• Customer representatives (especially the product owner) will be available throughout the duration of the Sprint. • The product backlog will be continuously refined in each Sprint, which may result in changes to overall scope and changes to required capacity.

5. *Deliverables*

Solution functionality, requirements and associated solution configurations will be defined in the backlog and are not considered formal deliverables when using an Agile Capacity-based delivery model.

Vendor will provide the following service deliverables in support of this engagement.

Name	Description	Acceptance Required
Sprint completion report	This report lists the in-scope items that have been completed during the sprint, any planned work that was not completed, and any project risks or problems. This report is produced as an output of each sprint. Note: The Sprint completion report is created from information within Azure DevOps.	No

6. Completion and DoD

Delivery sprint completion

As part of each Sprint review (Delivery sprints section), Customer will review each backlog item (user story or defects) completed in the Delivery sprint and confirm whether it is considered done using the

Definition of Done agreed during Engagement Baseline Planning. Each backlog item that is done will be recorded as such in Azure DevOps. The results will also be captured as part of the Sprint completion report.

The status of each completed backlog item must be updated in Azure DevOps within two (2) days after the Sprint review meeting is complete.

Backlog item completion

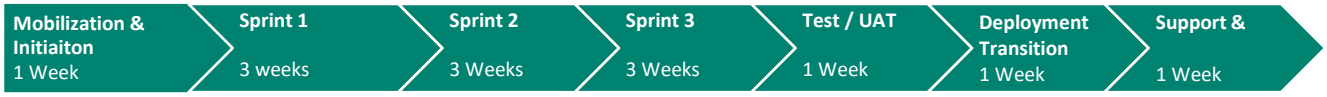
Backlog items (user stories or defects) do not require formal sign-off or Customer acceptance when they are completed by the delivery team. Any defects found in a finished backlog item will be added to the product backlog as a defect and prioritized by the Customer product owner with the other backlog items. A finished backlog item may also prompt the Customer product owner to add additional backlog items to enhance the software.

Timeline

The timeline for this engagement is relative to the project start date. All dates and durations provided are estimates only. The specific timeline will be finalized during Engagement Baseline Planning and will be updated as part of core project management activities.

The availability of resources and the capacity will be the primary factor for managing project timeline and duration.

The Vendor would provide a proposed capacity limited to a duration of **weeks** in addition to internal mobilization & initiation. The following figure will represent the distribution of the timeline.



Project governance

The governance structure and processes the team will adhere to for the project are described in the following sections.

Project communication

The following will be used to communicate during the project:

- **Communication plan**: this document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Vendor and the Customer as part of project planning.
- **Status reports**: the Vendor team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.

- **Status meetings**: the Vendor team will schedule regular status meetings to review the overall project status, the acceptance of deliverables, and open problems and risks.
- **Sprint completion report**: the Vendor project manager will compile sprint completion reports following the completion of each delivery sprint for distribution to both Customer and Vendor management.
- **Sprint review meetings**: meetings will be held to review the overall project status, the project schedule, and open issues that were noted in the reports.

Risk and issue management

The following general procedure will be used to manage active project issues and risks during the project:

- **Identify**: identify and document project issues (current problems) and risks (potential events that impact the project).
- **Analyze and prioritize**: assess the impact and determine the highest priority risks and issues that will be managed actively.
- **Plan and schedule**: decide how to manage high-priority risks and assign responsibility for risk management and problem resolution.
- **Track and report**: monitor and report the status of risks and issues.
- **Escalate**: escalate to project sponsors the high impact issues and risks that the team is unable to resolve.
- **Control:** review the effectiveness of the risk and issue management

  actions. Active issues and risks will be monitored and reassessed on a

  weekly basis.

Change management process

Typically, while handling changes to the product backlog, the Agile Scrum is set by design to handle variations as long as within the capacity team staffing levels and skills alignment. This means changes in the details and priority of requirements can be adjusted in the normal course of engagement delivery.

However, change requests may be required in certain circumstances. These may include:

- The original capacity is exhausted, or scheduled capacity is impacted and needs to be amended
- Changes to the resource labor category
- Change needed in overall project duration
- Project objectives have fundamentally changed from what was originally planned

The Vendor Agile Capacity Model does not guarantee that all items defined in the product backlog will be completed within the capacity assigned. Should the Customer decide to continue work after project completion described in Section 2.4, the Customer may do a change request, as described in change management described below.

During the project, either party may request modifications to the services described in this SOW. These changes only take effect when the proposed change is agreed upon by both parties. The change management process steps are:

- **The change is documented**: all change requests will be documented by Vendor in a Vendor change request form and submitted to the Customer. The change request form includes:
    - A description of the change.
    - The estimated effect of implementing the change.
- **The change is submitted**: the change request form will be provided to the Customer.
- **The change is accepted or rejected**: The Customer has three business days to confirm the following to Vendor:
    - Acceptance—the Customer must sign and return change request form.
    - Rejection—if the Customer does not want to proceed with the change or does not provide an approval within three business days, no changes will be performed.

Escalation path

The Vendor project manager will work closely with the Customer project manager, sponsor, and other designees to manage project issues, risks, and change requests as described previously. The Customer will provide reasonable access to the sponsor or sponsors to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

- Project team member (Vendor or the Customer).
- Project manager (Vendor and the Customer).
- Vendor delivery manager.
- Vendor and the Customer project sponsor.

Project completion

This is a **Time and Materials** contract. Vendor will provide services defined in this SOW to the extent of the fees available and the term specified in the Work Order. If additional services are required, the contract will be modified. The project will be considered complete when at least one of the following conditions has been met:

- All fees available have been utilized for services delivered and expenses incurred.
- The term of the project has expired.
- The Work Order has been terminated.

Due to the nature of the Vendor Agile Capacity Model, the final backlog items produced at the time of the conclusion of the engagement may or may not include the completion of all of the items in the product backlog identified by the Product Owner/Customer. This may result in a product which may not represent the minimal set of features required to satisfy the acceptance criteria for a production implementation. The Vendor team will rely on the Customer Product Owner to determine priority in the product backlog so that the most important backlog items can be completed during the engagement.

Project organization

Project staffing

The roles for the engagement are shown in section 3.1.1. The capacity available for each resource is specified in the associated **Work Order** for this engagement. If more capacity is needed, it can be added through the change management process.

Project roles and responsibilities

The key project roles and responsibilities are as follows.

Customer

Role	Responsibilities
Project sponsor	• Serve as a point of escalation to support clearing project roadblocks.
Product owner	• Estimated project commitment: 75-80%. • Manage and prioritize the product backlog. • Is accountable for taking decisions on services and/or product features • Serve as the primary person responsible for user story scope decisions during sprint planning. • Define acceptance criteria for work items, especially user stories. • Actively participate in all sprint reviews. • Serve as the single point of contact for decisions about product backlog items and prioritization. • Responsible for planning UAT and providing appropriate customer resources across sprints for testing. • Provides Vendor teams with prompt answers to questions affecting development activities and more generally services to be delivered.
Project manager	• Estimated project commitment: 50%. • Manage and coordinate the overall project and deliver it on schedule. • Take responsibility for Customer resource allocation, risk management, project priorities, and communication to executive management. • Coordinate decisions within 3 business days, or according to an otherwise agreed-upon timeline.
Subject matter experts and stakeholders	• Estimated project commitment: 20-50% • Participate in the Engagement baseline planning workshop. • Can provide guidance to the Customer product owner.
Technical Lead	• Estimated project commitment: 20-50% • Work to address technical requests and activities that must be completed by customer staff.

Role	Responsibilities
	• Provide access to other technical resources when needed.

Vendor

Role	Responsibilities
Delivery Management Executive	• Manage and coordinate the overall Vendor project. • Drive delivery governance and operational excellence. • Serve as a single point of contact for escalations, billing issues, personnel matters, and contract extensions.
Vendor project manager / Scrum master	• Manage and coordinate Vendor project delivery. • Take responsibility for issue and risk management, change management, project priorities, status communications, and status meetings. • Coordinate Vendor and Vendor subcontractor resources but not customer resources. • Project management may be delivered remotely • Ensures the team follows a disciplined scrum process. • Collaborate closely with the Customer product owner to manage the product backlog. • Facilitate the daily standup. • Help the team maintain their burndown chart. • Set up retrospectives, sprint reviews or sprint planning sessions. • Shield the team from interruptions during the sprint. • Remove obstacles that affect the team. • Walk the product owner through more technical user stories. • Encourage collaboration between the Scrum team and product owner.
Solution Architect	• Provide technical oversight. • Verify whether Vendor-recommended practices are being followed. • Responsible for overall solution design. • Help provide activities and backlog items that are related to the engagement. • Ensures the deliver team Follows defined development standards and guidelines. • May assist the Product Owner with understanding their responsibilities
Delivery Architect (Lead Consultant)	• Responsible for overall solution delivery • Drives Sprint activities including task planning and team completion • Drives configuration-first approach including data modelling and no-code UI development. • Works with the off-shore technical lead to understand an implement low- code solutions where applicable

Role	Responsibilities
	• Assists Product Owner in considering trade-offs • Helps the Product Owner make timely and informed decisions • Helps evaluate implications of trade-off decisions • Assists in prioritizing product backlog • Facilitates conversations between various product stakeholders so that the Product Owner can make an informed decision • Advises the Product Owner around technical aspects and helps assess impact from a software development perspective
Off-Shore Technical Lead	• Coordinate the assignments of Vendor technical consultants. • Take responsibility for the overall quality of all technical activities, including Customer development, infrastructure, interfaces, and solution performance. • Track and control solution code versions through the test and production environments. • Plan and perform solution and customization code changes. • Coordinate, project team, and offshore development resources. • Take responsibility for overall development quality, processes, and tracking. • Coordinate with the release manager and other roles on workstream
Off-Shore Technical Team	• Write and unit-test coded customizations. • Deliver on key skills areas including Power Pages enablement and automated file imports.
Off-Shore CI-CD Team	• ADO Setup • Release management for deployment

Customer responsibilities and project assumptions

Customer Responsibilities

In addition to Customer activities defined in the Customer is also required to:

- Provide information.
  - This includes accurate, timely (within three business days or as mutually agreed upon), and complete information.
- Provide access to people and resources.
  - This includes access to knowledgeable Customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
  - Acquire and install the cloud capacity that is needed to support the environments as defined in the scope section of this SOW.
- Provide access to systems.

    - This includes access to all necessary Customer work locations, networks, systems, and applications (remote and onsite).
- Provide a work environment.
    - This consists of suitable workspaces, including desks, chairs, and Internet access.
- Manage non-Vendor resources.
    - The Customer will assume responsibility for the management of all Customer personnel and vendors who are not managed by Vendor.
- Manage external dependencies.
    - The Customer will facilitate any interactions with related projects or programs to manage external project dependencies.
    - Troubleshoot systems that are not being developed by Vendor.
    - Confirm regulatory compliance.
    - Provide standard product training.
- Other general responsibilities.
    - The Customer will assign a team to collaborate on the project with the Vendor team.
    - Monitor network activity.
    - Provide application support.
    - Responsible for the financial costs associated with hardware purchasing, software licensing, or purchasing of Vendor or third-party tools.
    - Bug fixing and troubleshooting problems that are related to applications or other third-party software, hardware products, or applications that are not explicitly mentioned as in scope.
    - Prepare documentation about processes, standards, policies, or existing guidelines.
    - Plan, design, customize, enhance, troubleshoot, or resolve problems that are related, but not limited, to supporting the infrastructure listed here:
        - Firewalls.
        - Storage area networks.
        - Networks.
    - Design, install, and configure the environment (other than development and system testing).
    - Organizational change management.

Project assumptions

The project scope, services, fees, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and assumptions in this SOW will be validated, and if a material difference is present, this could result in Vendor initiating a change request to cover additional work or extend the project duration. In addition, the following assumptions have been made:

- Workday:
    - The standard workday for the Vendor project team is between **9 AM** and **5 PM**, Monday through Friday, local time where the team is working.
- Remote working:
    - The Vendor project team may perform services remotely.

- If the Vendor project team is required to be present at the Customer location on a weekly basis, resources will typically be on site for three nights and four days, arriving on a Monday and leaving on a Thursday.

- Language:
  - All project communications and documentation will be in **English**. Local language support and translations will be provided by the Customer.
- Staffing:
  - If necessary, Vendor will make staffing changes. These may include, but are not limited to, the number of resources, individuals, and project roles.
  - We have presumed that most of the design and implementation work will be performed by the Vendor. We have, however, assumed some level of involvement from your personnel as detailed in the Customer responsibilities. We have not accounted for any internal costs of that involvement.
  - Vendor will engage specific resources as deemed necessary by Vendor to support a specific technical area. This could require multiple individuals engaged to support the engagement, based on technical specialty.
  - The number of hours per role are estimated for this project and the actual number of hours by role may vary during the project life but will be monitored by Vendor project team members. Significant variations in estimated hours should be managed using the change management process.
- Informal knowledge transfer:
  - Customer staff members who work alongside Vendor staff will be provided with information knowledge transfer throughout the project. No formal training materials will be developed or delivered as part of this informal knowledge transfer.
- Known standards:
  - Vendor has expectations of utilizing Azure DevOps, Azure Pipelines and may use GitHub for a standard delivery.
  - Time will be required to learn the client tooling and backlog if there are deviations from Vendor standards. This time was not included in the estimation.
- Other assumptions:
  - All project resources will have the appropriate level of security access needed to complete project-related efforts.
  - Holidays, vacation, and training time have not been factored into this SOW.
  - All work is to be contiguously scheduled. Any breaks in the engagement calendar must be scheduled four weeks in advance, or it will be billed without interruption.
  - Client compliance training for highly regulated industries is not included in the estimation. This includes:
    - Security training
    - Internal onboarding
    - Financial compliance training
    - Healthcare compliance training
    - Procedures outside of Vendor standard compliance

        - Additional training
        - Background checks / Fingerprinting / Badging / Authentication
    - Customer agrees that Vendor, may associate Customer's Online Services with Professional Services accounts through configuration of the Customer's subscriptions, Azure resources

.and/or deployed applications.

- Browser compatibility:
    - Browser compatibility testing has not been estimated as part of the current duration. This may be added but it will affect the overall duration of the engagement in terms of the established budget.
- The Customer will meet the necessary requirements to help make sure the solution design meets regulatory requirements.
- If localization support is required—support for additional languages, for example—it will be added to the product backlog and implemented as part of regular sprint work.
- Vendor will not modify any existing code base that was not produced by the vendor team.
- Azure DevOps
    - Either the Customer will provide a Microsoft Azure DevOps Services account that is accessible by all team members, or Vendor will provide an account (with possibly limited access for the Customer.)
- It is assumed that the project team will work remotely.