

Microsoft Dynamics 365 Finance implementation services

 Request for Proposals  Health - Aging and Adult Services  20400, 20600, 20700, 20800, 20900, 25000, 39500, 92000

Release Date: Wednesday, March 26, 2025 · **Due Date:** Wednesday, April 23, 2025 5:00pm

 Posted  Wednesday, March 26, 2025 9:51am

All dates & times in Pacific Time

1. Introduction and Schedule

The County of San Mateo (the “County” or “SMC”) covers most of the San Francisco Peninsula. The region covers 744 square miles and is home to nearly 800,000 residents and 20 incorporated cities. The County provides for the health and welfare of all people within its borders and serves as the local government for the unincorporated areas. Innovation thrives here in industries including bioscience, computer software, green technology, hospitality, financial management, health care, education and transportation. The County prides itself on how that prosperity fosters its commitment to protecting and enhancing the health, safety, welfare and natural resources of the community.

1.1. Summary

Aging and Adult Services (AAS): San Mateo County AAS is a division of San Mateo County Health. The Division provides a wide range of services to assist seniors, people with disabilities and dependent adults live as safely and independently as possible in the community, as well as services associated with administering the estates of deceased persons for whom there is no one able or willing to serve as administrator. With regard to services to seniors, AAS’s overall goal is to develop an integrated long-term supportive services system for older adults and adults with disabilities that is person-centered and responsive to their individual needs, focused on coordinated home and community-based services, and flexible in its use of resources while reducing administrative duplication, complexity and fragmentation. The Division provides direct services which include centralized intake and referral; assessment and consultation; protective and supportive services and case management.

1.2. Background

AAS’ Public Guardian provides wraparound services to individuals who are unable to provide for their own basic needs through comprehensive care including medical care, social work services and financial management. AAS’ Public Administrator provide services after death for San Mateo residents who have passed away without available family member or loved ones to handle their estate. AAS is looking for a vendor to provide

Dynamics 365 Finance implementation services for AAS' Public Guardian (PG) and Public Administrator (PA) accounting applications in GCC (Government Community Cloud) based on the following conditions:

- Approximately 1,000 active client trust accounts that needs to be managed through Dynamics 365 Finance in GCC.
- County already purchased the required Dynamics 365 Finance GCC license.
- Vendor will work with AAS through Microsoft Dynamics Lifecycle Services (LCS) for US GCC for implementation including setting up an Azure subscription in GCC.

In October 2023, AAS released an informal solicitation for Dynamics 365 Finance implementation. Several proposals were received and MERP Systems, Inc. was selected to implement the project for AAS in the amount of \$200,000. AAS entered into contract with MERP Systems, Inc. in March 2024, but later discovered that the project would cost more than \$200,000. The contract with MERP Systems, Inc. was therefore terminated in February 2025 and this formal RFP is being issued. MERP Systems, Inc. may participate in this solicitation if they decide to do so.

1.3. Contact Information

Project Contact:

Elaine Wang

Contract Administrator II

Email: ewang1@smcgov.org

Phone: [\(650\) 713-8598](tel:(650)713-8598)

Procurement Contact:

Elaine Wang

Contract Administrator II

Email: ewang1@smcgov.org

Phone: [\(650\) 713-8598](tel:(650)713-8598)

Department:

Health - Aging and Adult Services

Department Head:

Louise F. Rogers

Chief, San Mateo County Health

1.4. Timeline

RFP Released:

March 26, 2025

Pre-Proposal Meeting (Non-Mandatory):

April 9, 2025, 2:00pm

TBD, please contact Elaine Wang at ewang1@smcgov.org

Deadline for Questions, Comments and Contract Exceptions:

April 18, 2025, 5:00pm

Proposal Due Date and Time:

April 23, 2025, 5:00pm

Interviews (tentative):

May 8, 2025

Anticipated Contract Award Date:

May 15, 2025