



December 13, 2022

**Vermont Information Technology Leaders, Inc. (VITL)** invites **Your Company** to submit a proposal for consulting services to assist VITL with document management strategies utilizing Microsoft 365, including SharePoint, OneDrive and Teams. Specific work packages will be negotiated on an individual basis as their need arises.

**1. Background:**

VITL's is a 501(c)(3) organization located in Williston, Vermont. VITL advances health care reform efforts in Vermont using health information technology and is the legislatively designated operator of the VHIE. The VHIE is a secure, statewide data network which gives health care providers in Vermont the ability to electronically exchange and access patient data. VITL's mission is to securely aggregate, standardize, and share the data needed to improve the effectiveness of health care for Vermonters.

Additional information regarding VITL may be found at <https://www.vitl.net>.

**2. Requested services:**

VITL is seeking written proposals from individuals or firms with a deep understanding of Microsoft 365 design and configuration, to augment VITL staff in the migration of business documents from a traditional file server environment to Microsoft 365 - SharePoint, OneDrive, and Teams. Respondents must be able to provide guidance related to the federal privacy and security requirements designed to protect the Personally Identifiable Information (PII) and Protected Health Information (PHI) data typically used in healthcare organizations; these include (but are not limited to) National Institute of Standards and Technology (NIST) SP800-53, and the Health Insurance Portability and Accountability Act (HIPAA) and Minimum Acceptable Risk Standards for Exchanges (MARS-E). Key elements of those projects would include

- design and implementation of an effective site, workspace and document library structure that supports ease of use, streamlined search and retrieval, and enhances organizational collaboration
- design and implementation of operational governance structure that supports regulatory and compliance requirements related to data classification, data life cycle management (retention, archiving, deletion), and eDiscovery
- development of policy, procedure and training materials that help ensure the ongoing effectiveness of the environment

**3. Proposal requirements:**

**1. Proposal schedule:**



- a. All interested firms must provide VITL a letter of intent to bid by December 20, 2022. Letters of intent should be emailed to the point of contact (see #12) with the subject line “VITL Operations – M365 Document Management Consulting Services” for this RFP.
  - b. All questions should be emailed with the subject line “VITL Operations – M365 Document Management Consulting Services” to point of contact for this RFP no later than 5 pm (EDT), January 4, 2023.
  - c. All questions will be reviewed and answered after the submission of questions deadline. A response to all questions will be emailed to all who responded no later than 5 pm (EDT), January 11, 2023,
  - d. All proposals must be received no later than 5 pm (EDT), January 17, 2023. Proposals should be emailed with the subject line “VITL Operations – M365 Document Management Consulting Services” to point of contact for this RFP.
  - e. VITL expects to follow up with selected vendors by February 28, 2023.
  - f. Contact with anyone other than the point of contact at VITL regarding this RFP could result in disqualification.
2. **All proposals must contain:**
- a. A cover letter which describes you and (or) your firm’s expertise and identifies key personnel that will provide the requested services. Identify which requested services the key personnel’s expertise addresses.
  - b. Provide a resume for each of key personnel proposed which describes their qualifications including their relevant project experience, professional qualifications, and certifications. Note, resulting contract will prohibit substitution of named key personnel without express written permission of an authorized VITL personnel.
  - c. Provide the names and telephone numbers of three customers where you have provided similar services during the past three years.
  - d. Provide hourly rates that will be valid from contract award through December 31, 2023, and for January 1, 2024, through December 31, 2024, for each individual proposed.
  - e. Indicate availability of key personnel during the contract period.
3. All proposals submitted shall be binding for one hundred twenty (120) calendar days following the due date for the proposals.
  4. All responses must be electronic, paper proposals will not be accepted. All proposals must be complete. VITL reserves the right to eliminate any bidders whose proposal is incomplete in VITL’s opinion.
  5. VITL reserves the right to award to the bidder(s) that presents the best value to VITL as determined solely by VITL in its absolute discretion.
  6. VITL is not responsible for any cost incurred by the bidder in either responding to this RFP, or in participating in meetings with the VITL prior to award.



7. VITL reserves the right to conduct discussions with bidders for the purpose of obtaining “best and final offers.”
8. VITL will make one or more awards for the requested services.
9. There is no obligation on VITL’s part to award any work packages (tasks) to an awardee.
10. VITL will evaluate its requirements for technical support to determine which awardee possesses the requisite expertise and availability and represents to VITL the best value for each individual task.
11. VITL and the awardee will negotiate work scope, schedule, and price (as expressed by labor hours multiplied by the awardee’s proposed labor rate) for each task.
12. The point of contact for this RFP is:  
Heidi Banks,  
Business Operations Manager  
RE: VITL Operations – M365 Document Management Consulting Services  
[hbanks@vitl.net](mailto:hbanks@vitl.net)