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Q1:

Category: A. Commercial & RFQ Process

Area: Service Start Date

RFQ Reference: RFQ Sections 4, 5 and 6

Question: The Evaluation Criteria references assigned staff availability beginning September 21, 2026, while the contract execution and target service commencement date is October 26, 2026. Please confirm the required resource availability date and the expected service start date.

Also, could please confirm the RFQ Response submission date is 25th September as per the RFP. However in GovWin it is mentioned as 21st September

A1.

The SOQ submission deadline is September 25, 2026 at 5:00 p.m. Pacific, per the RFQ header and Section 6; GovWin's September 21 reference does not match the issued RFQ and should be disregarded. The required resource availability date and expected service start date is October 26, 2026, per Section 6. The "September 21, 2026" reference in the Section 5 Evaluation Criteria table is a drafting error and is corrected by this Addendum to read October 26, 2026.

Q2:

Category: A. Commercial & RFQ Process

Area: Expected Support Volume

RFQ Reference: RFQ Sections 3 and 4

Question: Although services will be provided on an as-needed basis with no guaranteed minimum volume, could MWDOC provide an indicative estimate of anticipated support hours or requests per month, including the expected mix of break/fix, reporting, training, administration, and planned enhancement work?

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A2.

MWDOC cannot provide a reliable hours-per-month estimate, since D365 F&O has not yet gone live and no comparable usage history exists. MWDOC is a small, single-entity agency with one internal system administrator and roughly 10–15 end users; respondents should expect activity weighted toward reporting build-out and training in the first 90–180 days after Go-Live, tapering toward routine break/fix and enhancement work thereafter. This is the reason the RFQ is structured as as-needed with prepaid-hour blocks rather than a fixed monthly commitment.

Q3:

Category: A. Commercial & RFQ Process

Area: Submission Format

RFQ Reference: RFQ Sections 4 and 6

Question: Please confirm the preferred file format or combination of formats for the SOQ, resumes, rate sheets, and proposed agreement revisions.

A3.

PDF is preferred for the SOQ narrative, resumes, and any proposed agreement revisions. Rate sheets may be submitted as PDF or Excel. A single combined PDF is preferred where practical

Q4:

Category: A. Commercial & RFQ Process

Area: Page Limit

RFQ Reference: RFQ Section 4

Question: Please confirm whether the cover letter, cover page, table of contents, section dividers, and appendices are included within the 10-page SOQ limit, noting that resumes, rate sheets, and proposed agreement revisions are expressly excluded.

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A4.

Cover page, table of contents, and section dividers do not count toward the 10-page limit. The cover letter and all substantive narrative content (firm experience, assigned staff, references, support approach) do count. Appendices containing substantive narrative should be avoided; brief supporting exhibits (e.g., an org chart) are acceptable but should be used sparingly.

Q5:

Category: A. Commercial & RFQ Process

Area: Agreement Revisions

RFQ Reference: RFQ Sections 4 and Attachment A

Question: Please confirm the preferred format for proposed revisions to the Standard Professional Services Agreement, such as a redline, exception matrix, or narrative list of requested changes.

A5.

A redline is preferred

Q6:

Category: A. Commercial & RFQ Process

Area: Budget and Contract Value

RFQ Reference: RFQ Sections 4 and Attachment A, Exhibit B

Question: Please provide the anticipated budget range, expected annual support spend, or maximum contract authorization and approval from the board for this engagement, if available.

A6.

MWDOC has not published, and does not intend to publish, a budget ceiling or maximum contract value

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Q7:

Category: B. Support Model & Operations

Area: Support Delivery Model

RFQ Reference: RFQ Sections 3 and 4

Question: Please confirm whether services may be delivered remotely and identify any activities for which onsite support at MWDOC is expected or required. Does MWDOC is open for Hybrid Offshore and Onshore model from our global delivery centres ouside of USA?
Are proposed resources required to be US-based, or would the customer consider a global delivery model, including resources located outside the US, subject to applicable security, compliance, and access requirements?

A7.

Services may be delivered remotely; MWDOC does not require a standing onsite presence. MWDOC's tenant is Microsoft GCC Moderate — a U.S. government community cloud

Q8:

Category: B. Support Model & Operations

Area: Support Hours and Coverage

RFQ Reference: RFQ Sections 3 and 4

Question: Please confirm the required Pacific Time support window, business days, holiday coverage, and whether any planned or on-call support is expected outside standard business hours.

A8.

Standard coverage is 8am-5pm Pacific Time business hours, Monday–Friday, excluding MWDOC-observed holidays. MWDOC does not require dedicated after-hours or on-call coverage outside that window, except as addressed for Severity 1 incidents.

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Q9:

Category: B. Support Model & Operations

Area: Severity 1 Coverage

RFQ Reference: RFQ Section 3

Question: Does the two-business-hour Severity 1 response target apply only during the agreed support window, or is after-hours, weekend, or holiday coverage expected for critical incidents?

A9.

The two-business-hour target applies within the standard Pacific Time business-hour support window as a baseline. Depending on the severity and business impact of a given incident — for example, a Severity 1 issue affecting payroll, vendor payment, or a Board/Committee reporting deadline — MWDOC may require the selected partner to work after hours or on a weekend to resolve it. This is not a standing after-hours/on-call requirement, but respondents should describe their ability to flex hours when severity warrants it, including any associated after-hours billing assumptions

Q10:

Category: B. Support Model & Operations

Area: Current Support Model and Tools

RFQ Reference: RFQ Sections 3 and 4

Question: Please describe the current support structure, intake process, ticketing or service-management platform, escalation path, service reporting, and tools used to log, prioritize, track, and resolve requests.

A10.

D365 F&O has not yet gone live, so there is no established post-go-live support model to describe. During implementation, issues are handled directly between MWDOC's financial systems analyst and the implementation partner

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Q11:

Category: B. Support Model & Operations

Area: Historical Ticket Volumes

RFQ Reference: RFQ Sections 3 and 4

Question: Please provide available support-request data for the past 6 to 12 months, including monthly volumes and, if available based on previus system usage, distribution by severity, module or functional area, request type, resolution time, and backlog.

A11.

Not applicable. D365 F&O has no production history yet, and MWDOC does not have a comparable formal ticket dataset from its prior AccuFund system to offer.

Q12:

Category: B. Support Model & Operations

Area: Current Pain Points

RFQ Reference: RFQ Sections 2 and 3

Question: Please identify the key business, functional, technical, reporting, training, and operational challenges that MWDOC expects the selected support partner to address.

A12.

MWDOC's entire internal capacity is one financial systems analyst. The immediate priorities are (1) resolving configuration items and defects carried out of UAT/go-live, (2) building out Financial Reporting, Power BI, and Excel/Power Query reporting that could not be fully completed during the implementation timeline, (3) structured administrator and end-user training so MWDOC can operate independently, and (4) establishing sustainable update-testing, environment-refresh, and security/role-administration processes within GCC's constraints

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Q13:

Category: B. Support Model & Operations

Area: Open Issues and Stabilization Ownership

RFQ Reference: RFQ Section 3

Question: Please describe the intended ownership and resolution approach for open UAT defects, configuration gaps, and post-go-live stabilization items, including which items will remain with the implementation partner and which will transition to the selected support partner.

A13.

The implementation partner, is responsible for defects and configuration gaps identified through UAT and go-live, including an initial post-go-live stabilization period, under its existing engagement. Items unresolved at the end of that period, along with all new issues arising afterward, are expected to transition to the selected support partner. The specific list of open items at handoff will be shared with the selected firm during onboarding

Q14:

Category: C. Implementation, Transition & Knowledge Transfer

Area: Incumbent Partner Details

Question: Please provide existing incumbent partner details involved in the implementation process. Could you please clarify if the current RFQ is for Support services for D365 Finance and Operations, but not Business Central?

A14.

Confirmed: this RFQ covers Microsoft Dynamics 365 Finance & Operations in GCC only

Q15:

Category: C. Implementation, Transition & Knowledge Transfer

Area: Implementation History

RFQ Reference: RFQ Sections 1 and 2

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Question: Please provide a high-level implementation timeline, including major phases, key design decisions, testing milestones, go-live readiness activities, and any scope deferred from the initial implementation.

A15.

Discovery and functional design ran roughly December 2025 through March 2026, covering General Ledger, Accounts Payable, Accounts Receivable, Cash & Bank, Budgeting, and Fixed Assets. Configuration, environment build-out, and UAT/SIT testing followed through mid-2026; the go-live date has moved during the project and is now targeted for October 1, 2026 to allow additional stabilization time.

Q16:

Category: C. Implementation, Transition & Knowledge Transfer

Area: Incumbent Partner Responsibilities

RFQ Reference: RFQ Sections 1 and 3

Question: Please confirm whether a current implementation partner supports the D365 F&O environment and summarize that partner's responsibilities through go-live and stabilization in case of Open issues or defects identified during the Hypercare phase.

A16.

Our implementation partner is responsible for configuration, testing support, and cutover through go-live, including resolution of UAT-identified defects and an initial stabilization period.

Q17:

Category: C. Implementation, Transition & Knowledge Transfer

Area: Transition and Knowledge Transfer

RFQ Reference: RFQ Section 3 and Attachment A

Question: Please describe the expected transition duration, incumbent involvement, knowledge-transfer sessions, available documentation, access prerequisites, and acceptance criteria for completing transition to the selected support partner.

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A17.

Transition is expected to begin at contract start (October 26, 2026) and continue through initial stabilization, with our implementation partner involvement depending on support status at that time. MWDOC will provide existing implementation documentation and facilitate knowledge-transfer sessions with our implementation partner and MWDOC's financial analyst. There is no pre-defined formal acceptance checklist; MWDOC expects the selected firm to propose a transition/knowledge-transfer plan as part of its Support Approach

Q18:

Category: D. Resources & Delivery Model

Area: Resource Location and Global Delivery

RFQ Reference: RFQ Sections 2 and 5

Question: Must all support personnel be physically located in the United States, or will MWDOC consider a mixed or global delivery model, including personnel in Canada, India, or Pakistan, subject to GCC tenant access, security, onboarding, and compliance requirements?

A18.

MWDOC has no blanket prohibition on non-U.S.-based personnel

Q19:

Category: E. Training & User Adoption

Area: Training Scope, Format and Logistics

RFQ Reference: RFQ Section 3

Question: For both the financial systems analyst and the estimated 10 to 15 end users, please confirm whether the stated headcount is total or per session, the expected number and duration of sessions, delivery mode, onsite location if applicable, preferred schedule, documentation standards, and any train-the-trainer expectations.

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A19.

The 10–15 figure is a total headcount, not per session; MWDOC expects small, role-based group sessions (e.g., finance staff vs. requisitioner-only users) rather than one large session.

Q20:

Category: E. Training & User Adoption

Area: End-User Onboarding and Existing Materials

RFQ Reference: RFQ Section 3

Question: Please describe the user onboarding timeline and identify any existing role-based curricula, procedure guides, recordings, test scripts, or other training materials available from the implementation phase.

A20.

MWDOC has not finalized an onboarding timeline; this will be coordinated with the selected firm after go-live and initial stabilization. Some implementation-phase materials exist (UAT test scripts, end-user procedure guides and configuration documentation).

Q21:

Category: F. D365 Environment & Technical Operations

Area: User and Licensing Profile

RFQ Reference: RFQ Sections 2 and 3

Question: Please provide the current number of D365 F&O users by role and license type, the number of privileged or administrative users, and any expected changes in user volumes during the support period.

A21.

MWDOC's licensed D365 Finance user base covers the financial systems analyst (administrator) and the estimated 10–15 end users described in Section 3, with modest headroom for growth. MWDOC does not anticipate a material increase in licensed users during the support period. License-tier assignment by role (e.g., Team Members vs. Activity

— noting that PO and AP invoice approval require Activity-tier licensing) is an area MWDOC expects the support partner to help validate and optimize

Q22:

Category: F. D365 Environment & Technical Operations

Area: Current Solution Architecture

RFQ Reference: RFQ Sections 2 and 3

Question: Please provide a current-state architecture or landscape diagram covering D365 F&O modules, the three environments, identity and access, integrations, reporting components, data platforms, Power Platform services, Azure Government resources, and third-party systems.

A22.

A architecture diagram will be provided to the selected firm at transition rather than published in this addendum. At a high level: one production and two non-production environments, provisioned and managed as unified F&O environments through the Power Platform admin center in GCC Moderate; standard out-of-the-box configuration with no custom code, extensions, or third-party ISV solutions; modules in scope are General Ledger, Accounts Payable, Accounts Receivable, Cash and Bank Management, Fixed Assets, Budgeting, and Procurement and Sourcing; reporting via Financial Reporting, Power BI, and Excel/Power Query (Microsoft Fabric and Azure Synapse Link are not available in this GCC tenant); the only current external integration is the Paylocity payroll-journal interface; identity and access are managed through MWDOC's Microsoft 365 GCC tenant

Q23:

Category: F. D365 Environment & Technical Operations

Area: Environment Refresh and Copy Management

RFQ Reference: RFQ Sections 2 and 3

Question: Please describe the expected Production-to-non-Production refresh or copy cadence, responsible team or provider, standard process, expected support-partner role, and any GCC or PPAC constraints.

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A23.

There is no fixed refresh cadence established; copies and refreshes have been performed as-needed during implementation. MWDOC expects the selected partner to perform or support periodic non-production refreshes going forward (e.g., ahead of major testing or update cycles), subject to GCC/PPAC constraints on supported copy and conversion paths

Q24:

Category: F. D365 Environment & Technical Operations

Area: Release and Update Management

RFQ Reference: RFQ Section 3

Question: Please confirm the selected partner's responsibilities for One Version updates, hotfixes, regression planning and execution, non-production validation, MWDOC sign-off, production deployment coordination, and maintenance of the regression test library.

A24.

The selected partner tests all updates, hotfixes, and configuration changes in non-production first, with documented results and MWDOC sign-off, before any production promotion; maintains and executes a regression test library covering critical business processes; and coordinates production deployment windows

Q25:

Category: F. D365 Environment & Technical Operations

Area: Security, Roles and Licensing Optimization

RFQ Reference: RFQ Section 3

Question: Please identify any known security-role gaps, segregation-of-duties concerns, compensating-control requirements, user-provisioning improvements, access-review needs, or licensing optimization activities expected during the engagement.

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A25.

Security role design for a small finance staff — where full segregation of duties is not always achievable and compensating controls are needed

Q26:

Category: F. D365 Environment

Area: Version

Question: Could you please confirm if the original contract awarded was to implement D365 Business Central or D365 Finance & Operations?

A26.

The contract was originally awarded for Dynamics 365 Business Central. That scope was subsequently changed by contract amendment to Dynamics 365 Finance & Operations

Q27:

Category: G. Reporting, Analytics & Data

Area: Reporting and Data Architecture

RFQ Reference: RFQ Sections 2 and 3

Question: Please provide an inventory of current Financial Reporting statements, Power BI reports and dashboards, Excel or Power Query reports, semantic or data models, workspaces, data entities, OData feeds, DMF packages, and BYOD or Azure Government SQL components, including known support or performance issues.

A27.

A full inventory does not yet exist — building it out is a core purpose of this engagement. Current state: Financial Reporting is configured for core statutory/management statements; a small number of Power BI reports exist for Board packet reporting (via OData/data entities); Excel/Power Query is used for ad hoc analysis. No Azure Government SQL (BYOD) warehouse or recurring DMF feed is in production yet. Microsoft Fabric and Azure Synapse Link are not available in this GCC tenant

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Q28:

Category: G. Reporting, Analytics & Data

Area: Financial Reporting Backlog

RFQ Reference: RFQ Sections 2 and 3

Question: Which statutory, management, fund, division, budget-to-actual, cash-flow, subledger-detail, Board, or ad-hoc reports remain to be developed, enhanced, reconciled, or stabilized?

A28.

Fund and division financial statements, budget-to-actual reporting, and subledger-level detail for Board reporting still need to be built out, along with a supportable, repeatable data path into Power BI and Excel within GCC's constraints. A finalized, itemized report backlog will be shared with the selected firm at transition; most standard statutory/management statements should be expected to require completion, reconciliation, or stabilization following go-live.

Q29:

Category: G. Reporting, Analytics & Data

Area: Transaction and Data Volumes

RFQ Reference: RFQ Sections 2 and 3

Question: Please provide approximate monthly and peak-period volumes for general journals, AP invoices, vendor payments, purchase requisitions and orders, receipts, AR invoices and receipts, fixed assets, budget records, data imports or exports, and reporting queries.

A29.

MWDOC has not compiled formal transaction-volume statistics for this RFQ, and D365 F&O has no production history yet. Qualitatively, MWDOC is a single-entity public agency with no inventory or sales/CRM activity — transaction volumes are consistent with a small agency finance operation

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Q30:

Category: H. Integrations

Area: Paylocity Integration

RFQ Reference: RFQ Sections 2 and 3

Question: Please describe the Paylocity payroll-journal integration architecture, middleware or automation, frequency, file or API format, monitoring and reconciliation process, current production status, known issues, and availability of Paylocity or incumbent resources for dependency resolution.

A30.

The interface is a GL journal import of the Paylocity payroll register into D365 F&O — not a live/real-time API integration — aligned with MWDOC's payroll cycle. Monitoring and reconciliation is currently a manual review of the imported journal against Paylocity's payroll register before posting. This interface is still being finalized as part of the broader Paylocity rollout running in parallel with the D365 F&O implementation

Q31:

Category: H. Integrations

Area: Banking, ACH/NACHA and Positive Pay

RFQ Reference: RFQ Section 3

Question: Please identify the banks, account scope, file formats, transmission methods, and any ISV or third-party solutions used for ACH/NACHA and Positive Pay, and confirm the configuration, UAT, bank-validation, production-readiness, and outstanding stabilization status of each interface.

A31.

Our main Bank holds MWDOC's operating, payroll, and credit-card accounts; separate investment accounts at CAMP and LAIF (plus an inactive OCIP account) are reconciliation-only, with no payment generation. NACHA CCD (US) is configured as the ACH/EFT format for vendor payments from the Operating account, and Positive Pay is configured for the Operating and Payroll accounts, generated after each check run — both via Microsoft's

standard Electronic Reporting configuration, no custom code. As of this RFQ, configuration is built but formal file-format validation and acceptance testing with our Bank has not been completed; this is a known pre-go-live gate and may be an early stabilization item for the selected partner

Q32:

Category: H. Integrations

Area: Additional or Planned Integrations

RFQ Reference: RFQ Sections 2 and 3

Question: Are any integrations beyond Paylocity and banking currently in use, under development, or planned during the support term? If so, please provide the system, purpose, interface method, expected timing, and support ownership.

A32.

No. No other integrations are currently in use or firmly planned.

Q33:

Category: I. Functional Scope & Roadmap

Area: Functional and Organizational Roadmap

RFQ Reference: RFQ Sections 2 and 3

Question: Are any additional D365 modules, legal entities, financial dimensions, workflows, business-process changes, automation initiatives, or major enhancements planned during the next 12 to 24 months?

A33.

None currently planned. MWDOC's near-term roadmap is focused on stabilizing and optimizing what is already in scope

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Q34:

Category: I. Functional Scope & Roadmap

Area: Budget Management

RFQ Reference: RFQ Sections 2 and 3

Question: Please describe how the FY26/27 budget was loaded into D365 F&O, the current budget model and controls, and the expected ownership and process for future budget amendments, revisions, transfers, and recurring loads.

A34.

The budget is loaded as reporting-only entries against Fund, Cost Center, and Program, primarily via Excel/DIXF import, and transactions post regardless of budget availability. MWDOC follows a two-year (biennial) budget cycle. Ownership of future budget loads, amendments, and transfers is expected to remain with MWDOC Finance staff

Q35:

Category: J. Legacy Platform & Migration

Area: AccuFund Migration and Legacy Dependencies

RFQ Reference: RFQ Section 1

Question: Please describe the prior AccuFund landscape, migration approach, historical-data availability, reconciliation status, retained legacy access, unresolved migration issues, and any ongoing dependencies on AccuFund after D365 F&O go-live.

A35.

AccuFund was MWDOC's prior general ledger/accounting system. AccuFund will remain available in a read-only/reference capacity after go-live (license retained through September 2027) as an audit-trail safety net

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Q36:

Category: K. Governance, Backlog & Success Measures

Area: Service Consumption Model

RFQ Reference: RFQ Sections 4 and 6

Question: Does MWDOC expect to use primarily time-and-materials support, prepaid blocks of hours, separately approved scopes of work, or a combination, and are there preferred block sizes or authorization procedures?

A36.

A combination — prepaid-hour blocks for planned/predictable work (training, reporting build-out), drawn down over time, and separately authorized scopes of work for larger discrete projects — consistent with Section 4's request for one or more prepaid block options with pricing. MWDOC has no preferred fixed block size; respondents should propose block sizes and any tiered pricing they consider reasonable.

Q37:

Category: K. Governance, Backlog & Success Measures

Area: Current Backlog

RFQ Reference: RFQ Section 3

Question: Please provide the current backlog of support requests, reports, enhancements, documentation items, training needs, and technical-debt or stabilization activities expected to be inherited by the selected partner.

A37.

A finalized backlog will be shared with the selected firm at transition. At a high level it will include remaining reporting build-out, UAT/configuration pending items not resolved prior to handoff, end-user and administrator training/documentation, and initial security-role/licensing optimization work.

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Q38:

Category: K. Governance, Backlog & Success Measures

Area: Documentation Availability

RFQ Reference: RFQ Section 3

Question: Please identify available implementation and operating documentation, including solution design, configuration workbooks, process flows, data dictionary, security matrix, integration specifications, environment procedures, test scripts, deployment records, and known-issue logs.

A38.

MWDOC will provide functional design documentation, configuration references, and UAT test scripts to the selected firm. MWDOC does not maintain a separate formal data dictionary, security matrix, or integration specification beyond what's captured in those documents; a known-issues log will be compiled and shared as part of transition.

Q39:

Category: K. Governance, Backlog & Success Measures

Area: Microsoft, CSP and FastTrack Support

RFQ Reference: RFQ Section 3

Question: Please clarify who currently owns Microsoft support cases, CSP reseller coordination, and FastTrack engagement, and describe the selected partner’s expected authority, responsibilities, and escalation process.

A39.

MWDOC's finance analyst directly owns Microsoft support case management today. Our CSP reseller can help escalate on MWDOC's behalf; Microsoft FastTrack has also been engaged during implementation. MWDOC expects the selected support partner to open, manage, and drive routine Microsoft support tickets going forward, with MWDOC's financial systems analyst retaining final decision authority and remaining the CSP/FastTrack relationship owner of record.

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Q40:

Category: K. Governance, Backlog & Success Measures

Area: Success Criteria and Service Governance

RFQ Reference: RFQ Sections 3 and 4

Question: What outcomes and measures will MWDOC use to assess success during the first 90 to 180 days and the ongoing engagement, and what governance cadence, reporting, service reviews, or performance metrics are expected?

A40.

MWDOC has not adopted formal published KPIs for this RFQ. At minimum, MWDOC expects the selected firm to meet the response-time targets in Section 3, show measurable progress on the reporting backlog and training tracks within the first 90–180 days, and demonstrate MWDOC's internal team increasingly able to handle routine work independently over time.

Q41:

Category: K. Governance, Backlog & Success Measures

Area: Team Structure

Question: What is the current team structure available from MWDOC as part of implementation and in future support engagement? Is there any L1 team available with MWDOC or the future service provide is expected to cover L1 support as well?

A41.

MWDOC's current team is a single financial analyst/system administrator; there is no separate internal L1 team. The selected support partner is expected to provide L1 and higher-tier support directly, functioning as an extension of that one-person team, consistent with the RFQ's stated intent (Section 1).

Q42:

Category: Section V – Indemnification.

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Could you please confirm whether the indemnification provisions outlined in the RFQ are open to negotiation as part of the contracting process, particularly where certain provisions may need to be aligned with the selected vendor's standard contractual terms, insurance coverage, and applicable limitations of liability? If these provisions are negotiable, please advise on the process and stage at which proposed revisions may be submitted for the County's consideration.

A42.

Yes — indemnification, insurance, and limitation-of-liability terms are open for discussion during contract negotiation with the selected firm(s); they are not finalized at the SOQ stage. Respondents should identify, at the SOQ stage, any provisions they anticipate needing to negotiate — per the redline/exception-matrix/narrative format described in the RFQ — so MWDOC can weigh negotiability as part of evaluation.

Q43:

For RFQ FIN. 2026-001, can you confirm whether a proposer may include a specialized subcontractor that supplies non-production AP-to-report regression and reconciliation controls, while the prime retains responsibility for the RFQ's Microsoft partner, GCC Moderate, and reference requirements? If permitted, please indicate any required disclosure or form.

A43.

Subcontracting a specialized function such as non-production AP-to-report regression/reconciliation testing is permitted, provided the prime respondent retains overall responsibility for the engagement

Q44:

Can an LLC manage this engagement with a disclosed Microsoft partner as its technical subcontractor? Would that partner's Microsoft status, GCC experience, and public-agency references satisfy the qualification requirements, or must the prime hold them directly?

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A44.

See A43

Q45:

Section 1 – About MWDOC and Invitation; Section 6 – Submittal and Schedule

MWDOC's D365 F&O go-live is scheduled for October 1, 2026, while contract execution and the target date to begin services under this RFQ is October 26, 2026. Could MWDOC clarify who is providing support coverage during that intervening period — is the implementation consultant continuing to provide hypercare through that window, or is there a coverage gap the awarded firm should plan to help bridge as part of onboarding?

A45.

The implementation partner continues providing hypercare/stabilization support through go-live and into the initial post-go-live stabilization period under its existing engagement

Q46:

Section 2 – Current Environment (GCC Note)

The RFQ notes that consultant personnel will be issued accounts in MWDOC's GCC tenant and must complete MWDOC's onboarding and security requirements before beginning work. Can MWDOC share the typical lead time for this process, and confirm whether there are citizenship or “U.S. Person” screening requirements for access to the GCC Moderate tenant? Given the October 26, 2026 target start date, understanding this timeline will help respondents plan staffing and onboarding appropriately.

A46.

No citizenship or "U.S. Person" screening requirement is specified in the RFQ. Regarding lead time, see question 98 — no formal SLA has been established. Note: we are a GCC-Moderate environment.

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Q47:

Section 2 – Current Environment (Environments)

The RFQ states that there is no usable Lifecycle Services path in MWDOC's tenant and that environments are provisioned and managed through the Power Platform admin center (PPAC). Can MWDOC describe, or confirm, how environment refreshes, configuration data packages, and update deployment are currently being performed through PPAC in the absence of LCS? This will help respondents describe a technical approach that matches MWDOC's actual environment operations.

A47.

See A22–A24 for environment topology and refresh/update responsibilities generally

Q48:

Attachment A – Exhibit B (Scope of Work, Terms of Agreement and Terms and Conditions for Billing)

Exhibit B of the Standard Professional Services Agreement (term, budgeted amount, fees, and scope) is provided as a blank template to be completed at award. Can MWDOC indicate the anticipated initial contract term (for example, a one-year term with renewal options versus a multi-year term) and an approximate annual budgeted amount or hours volume, so respondents can propose a right-sized team and rate structure?

A48.

See question 6 regarding budget. Regarding volume, this is not yet determined as Go-Live has not happen yet.

Q49:

Attachment A, Section I.C – Changes in Scope of Work; Section 3 – Scope of Services

Because work outside the scope described in Exhibit B requires a signed change order, can MWDOC describe how as-needed support will be authorized in practice — for example, a standing monthly scope of work or budget the consultant works against, versus

authorization on a ticket-by-ticket basis? This will help respondents confirm they can meet the 2-business-hour Severity 1 response target without an authorization delay.

A49.

See question 36

Q50:

Section 2 – Current Environment (Adjacent systems); Section 3 – Scope of Services (Integrations and Data Management)

The RFQ identifies Paylocity (HR, timesheet, payroll) as an adjacent system, with a payroll journal interface into D365 F&O in scope for support. Can MWDOC describe the current design of this interface — integration method (e.g., Data Management Framework, middleware, or another mechanism), frequency, and whether it was built by the implementation consultant or by Paylocity — so respondents can scope support and knowledge-transfer activities accurately?

A50.

The file-based journal import was configured on the D365 side by the implementation partner as part of the F&O build, working from a payroll register export produced by Paylocity/MWDOC HR

Q51:

Section 3 – Scope of Services (Process Optimization and Documentation)

Will the awarded firm receive the current implementation consultant's as-configured system documentation, data dictionary, and UAT defect/gap log as part of onboarding and transition, or is producing this documentation considered part of this engagement's scope of services?

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A51.

Providing existing documentation is MWDOC's transition responsibility, not something the selected partner needs to produce from scratch

Q52:

Section 3 – Update Testing and Environment Operations

MWDOC notes that the selected consultant will prepare and escalate Microsoft support tickets and coordinate with Microsoft and MWDOC's CSP reseller. Does MWDOC currently maintain its own Microsoft support plan or support-case entitlement for its GCC environment, or does MWDOC anticipate that the selected Microsoft partner will utilize its own partner support cases when escalation to Microsoft is required?

A52.

MWDOC does not separately hold a paid Microsoft "Unified Support" or similar premier support plan

Q53:

RFQ Section 3 – Application and Functional Support

Does MWDOC anticipate that configuration changes and remediation of implementation or stabilization items will be handled as as-needed T&M support, or are there known outstanding items that respondents should account for in their proposed support approach?

A53.

yes to both — routine remediation is expected to run under the as-needed T&M/prepaid-block model

Q54:

RFQ Section 3 – Reporting and Analytics

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Does MWDOC have an anticipated volume or cadence for report development and modification requests, and are there any known reporting needs that should be considered?

A54.

See A28 for the known reporting needs (fund/division statements, budget-to-actual, subledger-level Board detail, and a supportable Power BI/Excel data path).

Q55:

RFQ Section 3 – Technical and Administrator Training / Knowledge Transfer

Does MWDOC have an anticipated training cadence, number of hours, or desired timeline for completing the initial administrator knowledge-transfer activities, or should respondents propose a recommended approach?

A55.

MWDOC has not set a fixed number of hours or cadence

Q56:

RFQ Section 3 – End-User Training

Does MWDOC have an anticipated frequency or volume for end-user training, including new-employee onboarding and refresher sessions, or should respondents assume these services will be scheduled on an as-needed basis?

A56.

Yes, as-needed

Q57:

RFQ Section 3 – Update Testing and Environment Operations

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Can MWDOC clarify the expected division of responsibility for regression and update testing, including which testing MWDOC staff will perform versus which business-process testing the selected consultant will be expected to execute?

A57.

The selected partner is expected to execute and maintain the regression test library and perform the non-production testing of updates/hotfixes/config changes. See A24

Q58:

RFQ Section 3 – Update Testing and Environment Operations / Microsoft Support

Does MWDOC currently maintain its own Microsoft support plan or support-case entitlement for its GCC environment, or does MWDOC anticipate that the selected Microsoft partner will utilize its own partner support cases when escalation to Microsoft is required?

A58.

See question 52

Q59:

RFQ Section 3 – Integrations and Data Management

Are the integrations and automations identified in the RFQ currently implemented and primarily requiring ongoing support, or does MWDOC anticipate that the selected consultant will design and develop new integrations or automations as part of the engagement?

A59.

The two existing interfaces (Paylocity GL journal import; NACHA/Positive Pay banking) are configuration work already substantially built by the implementation partner but not yet fully production-validated

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Q60:

RFQ Section 3 – Response Targets

For the response targets identified in the RFQ, including the two-business-hour Severity 1 target, does "response" mean acknowledgement and initial triage of the request, or does MWDOC expect a qualified D365 resource to begin actively working the issue within the stated response period?

A60.

The latter

Q61:

RFQ Section 3 – Support Coverage / Availability

Are the response targets applicable only during the selected consultant's proposed business hours, or does MWDOC anticipate a need for after-hours, weekend, or extended coverage during critical periods such as month-end, year-end, or Board reporting?

A61.

See question 8 and 9

Q62:

RFQ Section 4 – Assigned Staff and Availability

Does MWDOC expect the personnel identified in the proposal to be specifically reserved or dedicated to MWDOC, or may the selected firm utilize a broader qualified D365 support team provided the required expertise, continuity, and response targets are maintained?

A62.

MWDOC does not require personnel to be exclusively dedicated to MWDOC with no other clients, provided the specific individuals named in the SOQ are the ones actually performing the work, continuity is maintained

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Addendum #1

Q63:

RFQ Section 3 – Technical and Administrator Training / End-user training

Does MWDOC have any expectations regarding training format, i.e. in-person vs. remote/online training?

A63.

See question 7

Q64:

RFQ Section 3 – Knowledge Transfer

Does MWDOC have any specific KPIs or metrics they want to see to demonstrate how their dependence on outside support is reduced over time?

A64.

no formal published KPIs beyond the qualitative expectation

Q65:

RFQ Section 3 - SLAs

How does MWDOC define "project work" and "planned enhancement?"

A65.

MWDOC has not published a rigid, bright-line definition (e.g., a fixed hour threshold).

Q66:

Will the current D365 F&O implementation partner continue to provide support during or after go-live? If so, in what capacity?

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A66.

yes, through go-live and an initial stabilization period, resolving UAT-identified defects, with items unresolved at the end of that period transitioning to the selected support partner.

Q67:

Will there be a structured and documented transition from the implementation partner to the selected support partner, including an overlap period, joint working sessions, knowledge transfer, and a formal sign-off checklist?

A67.

MWDOC expects transition to include KT sessions and coordination between the implementation partner and the selected support partner during the initial support period

Q68:

Will the selected support partner receive formal knowledge-transfer sessions, solution walkthroughs, and access to configuration, functional design, technical design, and implementation documentation?

A68.

Generally yes — see A17/A38.

Q69:

What implementation documentation will be provided, including solution blueprint, configuration workbooks, process flows, security matrix, integration specifications, report inventory, test scripts, and deployment documentation?

A69.

See A38/A28. Documentation will be shared to the extent it exists; some items (formal data dictionary, security matrix) don't exist as separate artifacts today.

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Addendum #1

Q70:

Can MWDOC share known issues, workarounds, open defects, risks, and lessons learned from the implementation?

A70.

See A13/A38.

Q71:

Can MWDOC provide the backlog of post-go-live development, integration, reporting, configuration, and customization items, including items deferred from UAT or go-live?

A71.

See A13,28,37

Q72:

The RFQ indicates a production go-live date of October 1, 2026 and a target service start date of October 26, 2026. Who will provide production support and post-go-live stabilization between these dates?

A72.

Duplicate of Q45

Q73:

Is the selected consultant expected to perform transition, knowledge transfer, environment review, documentation review, or support-readiness activities before October 26, 2026?

A73.

Not expected as billable work before contract start; details subject to confirmation with the implementation partner and Finance Director.

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Addendum #1

Q74:

Will the selected vendor receive access to the D365 F&O environments before October 26 to perform transition and support-readiness activities?

A74.

Not currently planned; subject to change if needed for onboarding.

Q75:

What specific transition activities are expected between contract award and the October 26, 2026 service start date?

A75.

Expected to be limited to administrative onboarding; specifics to be confirmed.

Q76:

Can MWDOC provide an overview of the key end-to-end business processes implemented in D365 F&O, including procure-to-pay, order-to-cash, record-to-report, budgeting, cash management, fixed assets, and month-end/year-end close?

A76.

See A22/30/31/34 Standard D365 F&O finance processes only — no inventory or sales/CRM. Detailed documentation available at transition

Q77:

How many financial dimensions are currently configured, and are any changes to the chart of accounts or dimensions planned after go-live?

A77.

Nine financial dimensions configured; no changes currently planned (Q33)

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Addendum #1

Q78:

How many total D365 F&O users are expected at go-live, and how are they distributed across functional areas?

A78.

10–15 users total plus the administrator; detailed role breakdown not published.

Q79:

What is the expected approximate distribution of support demand across functional issues, configuration requests, reporting requests, technical issues, integration issues, and enhancements?

A79.

No numeric split available.

Q80:

Are there any other major business processes, modules, or planned phases that should be considered when sizing the support engagement?

A80.

none currently planned.

Q81:

Are there existing Power BI reports, Financial Reporting statements, Excel/Power Query reports, dashboards, and security roles that the selected partner will inherit?

A81.

Yes, generally.

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Addendum #1

Q82:

Approximately how many Financial Reporting reports, Power BI reports/dashboards, and Excel/Power Query reports currently exist?

A82.

No formal count available; a full inventory will be compiled and shared at transition

Q83:

Approximately how many new reports or dashboards does MWDOC expect to develop during the first 12 months after go-live?

A83.

No fixed number; volume tied to backlog resolution

Q84:

Is there an existing backlog of Board, management, statutory, financial, or operational reports that still need to be developed?

A84.

See question 28

Q85:

Since Microsoft Fabric and Azure Synapse Link are not available in GCC, what is MWDOC's preferred data architecture for Power BI and Excel reporting?

A85.

Not yet determined; expected to be evaluated collaboratively with the selected partner.

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Addendum #1

Q86:

Approximately how many recurring Data Management Framework import/export jobs are currently in use?

A86.

None currently recurring/automated in production; DMF used for periodic manual imports only.

Q87:

Is the Paylocity payroll interface already built, tested, and operational, or does this engagement include completing its development and testing?

A87.

See A30. Not confirmed fully operational as of this RFQ; may need completion/refinement post-award.

Q88:

Can MWDOC provide functional and technical documentation for Paylocity, banking integrations, NACHA/ACH, Positive Pay, and other existing interfaces?

A88.

See question 38,31. Documentation is in the works and should be available for selected partners

Q89:

Who owns and supports the external systems connected to D365 F&O, particularly Paylocity and banking systems?

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A89.

The D365-side interfaces are owned by MWDOC's systems analyst; the source systems themselves (Paylocity, banking) are owned by their respective MWDOC business functions, not the D365 support partner.

Q90:

Are there any known integration issues, planned interface changes, or integrations scheduled for development after go-live?

A90.

See A30 and 32

Q91:

The RFQ states that the production solution is out-of-the-box with no custom X++ code, extensions, or third-party ISV solutions. Please confirm whether any customizations exist in non-production environments or are planned after go-live.

A91.

No known customizations beyond standard Electronic Reporting configs.

Q92:

Are there any planned customizations, extensions, ISV solutions, or enhancement initiatives that the selected partner should anticipate?

A92.

none currently planned.

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Addendum #1

Q93:

Will enhancements and project work always require a separately approved scope of work or change order before work begins?

A93.

Generally yes for discrete project work

Q94:

If future custom development is approved, will it be billed under the same hourly support rates or treated as separately priced project work?

A94.

Not determined; likely separately priced, subject to negotiation

Q95:

What level of documentation is expected for configuration changes, reports, integrations, security changes, and other enhancements?

A95.

No fixed template published; standard professional documentation practices expected. Respondent to describe its approach

Q96:

Is there an existing segregation-of-duties matrix and security role design that the selected partner will maintain, or is the partner expected to establish the baseline?

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Addendum #1

A96.

See A25, A baseline exists; a formal SoD matrix is expected to be developed collaboratively post-award.

Q97:

What is the process for requesting, approving, and provisioning consultant access to the GCC Moderate tenant and related systems?

A97.

Coordinated directly with MWDOC's systems analyst; no formal ticketing process exists today. Subject to change

Q98:

How long does MWDOC typically require to provision consultant accounts, and what access/security lead time should the selected vendor plan for?

A98.

No published SLA. Plan for a short lead time, but this is not a documented commitment.

Q99:

Does MWDOC require a specific secure remote-access setup, such as VPN, managed devices, MFA, endpoint controls, or additional security checks?

A99.

MFA is required for all access to the GCC environment. MWDOC does not currently mandate a dedicated VPN or managed-device (MDM) enrollment for this access; endpoint and access controls are reviewed periodically and updated as security requirements evolve.

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Addendum #1

Q100:

Is the selected support partner expected to provide any D365, Power BI, Power Platform, Azure, or other Microsoft licenses, or will MWDOC provide all required licenses?

A100.

No — MWDOC provides all Microsoft licensing.

Q101:

Are resolution-time commitments expected in addition to the response-time commitments stated in the RFQ?

A101.

No formal resolution SLA beyond the response targets in question 8 and 9

Q102:

For Severity 1 incidents, is continuous work expected until resolution, or is the requirement limited to the initial response within two business hours?

A102.

urgency scales with impact; not an automatic round-the-clock commitment on every ticket.

Q103:

What are the expected definitions and examples for each incident severity level?

A103.

No formal definitions published. General framework expected to be finalized collaboratively post-award — treat any draft framework as illustrative only, not a MWDOC standard.

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Addendum #1

Q104:

Does MWDOC expect a monthly or periodic support report covering ticket volumes, SLA performance, open issues, root causes, enhancements, hours consumed, and trends?

A104.

Yes, generally (e.g., monthly); no fixed template or cadence mandated yet.

Q105:

Will MWDOC provide the support partner direct access to Microsoft support channels, or will Microsoft cases need to be coordinated through MWDOC or its CSP reseller?

A105.

See question 39 and 52.

Q106:

Who currently manages Microsoft's One Version update schedule, and what level of involvement is expected from the support partner for each update cycle?

A106.

MWDOC currently monitors update notices; the partner is expected to take the primary tracking/testing role with MWDOC sign-off

Q107:

Will the support partner have authority to deploy approved changes to production, or will all production deployments be performed by MWDOC?

A107.

Generally yes, subject to MWDOC's sign-off and retained approval authority

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Addendum #1

Q108:

What change-management, testing, approval, and production deployment processes are currently in place?

A108.

See question 10 and 24

Q109:

How many hours or days of structured administrator training does MWDOC expect during the first year?

A109.

See questions 20 and 55

Q110:

Can administrator and end-user training be delivered remotely, or is onsite training expected?

A110.

yes

Q111:

Does MWDOC have existing training materials, procedure guides, or knowledge articles that the selected partner will maintain, or should these be created from scratch?

A111.

Some materials exist; maintaining/expanding them is expected to be part of scope.

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Addendum #1

Q112:

Is there a defined target or timeframe for MWDOC's internal financial systems analyst or other team members to become independently capable of administration and report development?

A112.

No hard target published.

Q113:

Are there specific training deliverables, training plans, or knowledge-transfer milestones expected as part of the engagement?

A113.

Respondent to propose.

Q114:

Since the system operates in a GCC Moderate tenant, does MWDOC permit qualified support personnel located outside the United States, including India, to provide remote D365 F&O support?

A114.

Yes, subject to Question 18’s conditions

Q115:

If an offshore delivery center is used, can India-based resources be included as named key personnel in the proposed team?

A115.

Yes, subject to Question 18’s conditions

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Addendum #1

Q116:

If an India-based entity or offshore affiliate performs services, what contractual, insurance, compliance, security, or other requirements apply to that entity?

A116.

Standard contractual framework applies regardless of location

Q117:

Are subcontractors or offshore delivery partners permitted, subject to MWDOC's prior written approval and security requirements?

A117.

Yes, subject to answers in: 43 and 18

Q118:

Does the prime consultant need to be a US-registered legal entity, or may a non-US entity submit directly or through a US contracting entity or affiliate?

A118.

No blanket requirement stated

Q119:

After award, will MWDOC permit replacement or addition of support personnel with equivalent or better qualifications, subject to approval?

A119.

Generally yes, subject to MWDOC approval and continuity

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Addendum #1

Q120:

Does MWDOC expect dedicated resources, or may proposed resources be shared across multiple client engagements?

A120.

Duplicate of Q62

Q121:

Does MWDOC prefer one primary consultant or a team with separate functional, technical, reporting, integration, and development specialists?

A121.

No preference; respondent to propose whatever staffing model meets required coverage

Q122:

Will onsite visits to MWDOC's Fountain Valley, California office be required for kickoff, transition, workshops, training, or other activities? If so, how often and for how long?

A122.

no standing onsite requirement.

Q123:

Can regular support, development, training, and knowledge-transfer activities be delivered remotely, with onsite visits only when specifically requested?

A123.

Yes

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Addendum #1

Q124:

Is support expected only during Pacific Time business hours, or are after-hours and weekend coverage required for Critical or Severity 1 incidents?

A124.

Duplicate of Q61

Q125:

If onsite visits are required, will reasonable travel and accommodation expenses be reimbursed separately, or included in the proposed hourly rates?

A125.

Not currently applicable given no onsite requirement

Q126:

Can MWDOC provide an estimated annual budget, expected annual support hours, or approximate monthly utilization to help respondents size the proposed team and pricing?

A126.

See questions 6 and 48

Q127:

What is the expected contract term, including renewal or extension options?

A127.

See question 48

Q128:

For prepaid or committed hour blocks, do unused hours expire at year-end or roll over?

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A128.

Not established; respondent to propose standard terms, subject to negotiation

Q129:

Is there a preferred or maximum annual rate-escalation methodology or percentage?

A129.

Not established; respondent to propose, subject to negotiation.

Q130:

Is there a preferred or maximum minimum billing increment for hourly services?

A130.

Not mandated; respondent to state its standard increment.

Q131:

Does MWDOC anticipate different rate structures for functional support, technical support, development, reporting, integration, project work, or after-hours support?

A131.

No mandated structure; respondent to present its proposed rate structure clearly.

Q132:

The standard agreement refers to a budgeted/not-to-exceed amount and cost-to-complete estimate at 80% utilization, while the RFQ states that no fixed fee or not-to-exceed price should be proposed. Please clarify how these provisions are intended to operate.

A132.

This is still being worked out. General intent is that the budgeted/NTE figure reflects the negotiated as-needed authorization level, not a fixed-price deliverable.

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Q133:

The agreement assigns intellectual property rights in deliverables to MWDOC. Please confirm that this does not transfer ownership of the consultant's pre-existing tools, accelerators, templates, methodologies, reusable components, or proprietary IP.

A133.

Confirmed — see Attachment A, Section X.D

Q134:

The agreement requires $2,000,000 in Cyber/Technology Liability insurance. Is this requirement flexible based on the size and risk profile of the firm?

A134.

See question 42

Q135:

The RFQ references September 21, 2026 and October 26, 2026 as dates related to staff availability. Which date should respondents use for planning and confirming resource availability?

A135.

Duplicate of Q1

Q136:

What is the expected procurement and award timeline from proposal submission through contract execution?

A136.

Please refer back to the RFQ

Responses to Questions Received on the Request for Qualifications (RFQ): Post-Implementation Support Services for Microsoft Dynamics 365 Finance & Operations (RFQ No. FIN. 2026-001)
Addendum #1

Q137:

If interviews are held, will they be conducted in person or online, and approximately how much notice will shortlisted respondents receive?

A137.

Not determined; likely remote if held

Q138:

Are there any mandatory onboarding, background-check, security-clearance, or vendor-registration activities that should be completed before services can begin?

A138.

Some standard vendor onboarding steps are anticipated before services begin — generally along the lines of vendor registration, insurance documentation, and account/security setup