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Request for Proposals: MassCEC Customer Relationship Management System and Services

Questions submitted by Interested Applicants & MassCEC Responses

March 24, 2025

Section: A.I.

#	Question	Response
1	**Will the vendor be able to use AI for transcription and to support other activities (like user story creation)?**	• We are open to the use of transcription on the vendor's side provided we are informed in advance. The AI tool or service being used must be disclosed. • All AI generated output must be validated for accuracy and completeness by the vendor prior to submission.
2	**How would you prioritize the use of artificial intelligence tools and capabilities? Is this a "nice to have" to be in later "phases"? Or is it an intended goal to have the system leverage these innovative features? Do these considerations include all types of AI capabilities (predictive, generative, etc.)?**	We would welcome AI especially to the degree that it helps us more quickly identify problems with our data, automate data entry, or supports activities like editing of in-system emails or forms. MassCEC is open to AI-assisted summaries and other tools that help interpret qualitative and quantitative information. However, we want transparency in how AI-generated content is derived and will implement additional layers of validation for decision-making.
3	**Does MassCEC have a preference for a specific Large Language Model (LLM)?**	MassCEC in the next few months will be rolling out access to Microsoft Copilot for our staff, which combines GPT-4o with a proprietary Microsoft model. We will evaluate and approve the use of other LLMs associated with specific applications on a case-by-case basis.
4	**Is MassCEC looking for AI-assisted search capabilities as part of this project?**	MassCEC is open to exploring AI assisted search capabilities including those that enhance information retrieval and analysis. We are interested in AI-assisted summaries and other tools that help interpret qualitative and quantitative information. However, we want transparency in how AI-generated content is derived and will implement additional layers of validation for decision-making.

Section: Communication with External Stakeholders

#	Question	Response
5	**What are your key goals for improving communication with program members**	• For the CRM overall, we seek to create a single source of truth around external

	and grant recipients through a new CRM and Grant Management system? [Based on Sections 1, 5.1, 6]	stakeholder/grantee relationships; help program teams to better track progress of stakeholders through different program offerings; create more transparency across the organization around grant and investment opportunities. • For the Grants management system in particular we seek to automate key tasks now done by email resulting in a more streamlined communication process with grantees/potential grantees from the application process. Specifically, be able to create customized application forms; have a centralized location where grantees will be able to upload information or key data for milestone tracking purposes; enable automated email communication/alerts to applicants/grantees.
6	**Does MassCEC have existing portal technology that should integrate with the CRM?**	• No, all current processes rely on email, Excel spreadsheets, and Mailchimp.
7	**The Grant Management Platform requirements include "Grantee & Internal Messaging" (Section 6.3). What types of communication do you anticipate using this secure portal for? What are your needs for internal collaboration related to external communications?**	• For applicants – To automatically notify applicants of relevant RFPs, as well as award status or other grant requirements. • To have grantee upload reports or fill out forms to report on their progress against their grants • Internally - to have a space where approvals of recommended awards and review of contracts can be handled seamlessly by key reviewers across the organization. • Potentially to have a space for external reviewers to score/evaluate grant applications
8	**You mentioned a desire for "Marketing/Communication Automation" in the CRM (Section 6.2). Could you elaborate on the specific types of automation you envision (e.g., automated emails, newsletters, follow-ups)?**	Yes, we would be looking for all of the above. Ideally, we would also be able to bring information about an individual's use of the MassCEC website to inform targeting and follow-ups.
9	**What kind of customer segmentation and analytics are you hoping to achieve for your communications? [Based on Section 6.2].**	• The priority audiences/segments we would be tracking are 1) overall - individuals who are interacting with us via our emails and websites, 2) grant applicants/grantees, 3) Climate Tech companies we are seeking to support, 4) state legislators and other government officials, 5) potential and current portfolio companies, these segments are not mutually exclusive. Our analytics would vary depending on the goals for each segment.

		• Currently, our Marketing team segments grant recipients in Mailchimp for email and engagement opportunities based on thematic interest/involvement in previous grant rounds; program teams might also have specific lists for grantees, reviewers, or other external stakeholders that they send out communications for grants, engagements, or other opportunities. There is no one process across the organization.
10	**You use Eventbrite for events and Zoom for webinars (Section 3.I). What are your requirements for integrating these platforms with the new CRM for registration, tracking, and follow-up communications? [Based on Section 6.2]**	• The goal is to integrate these platforms with a new CRM. • We want to store and track attendee information to be able to better target MassCEC email campaigns and services; track external stakeholder engagement over time.
11	**How important is personalization in your communications, and what level of personalization are you aiming for?**	• See additional responses in this section.
12	**Do you have templates or standard communication workflows that you would like to see incorporated into the new system?**	Right now we have very little to no automated external communication with grantees or external stakeholders with the exception of some automated emails that are sent out in Mailchimp, surveys, etc. We would need to develop these. Within our current grant-making system we have a number of internal workflows: • RFP approval workflow • Awards funding request approval workflow • Awards Contract approval workflow • Non-Awards contract approval workflow • Contract amendment workflow • Payments approval workflow
13	**Could you describe the primary methods you currently use to communicate with grant recipients at different stages of engagement (e.g., pre-application, application, award, post-award)? [Based on Sections 3.I, 3.2]**	• Marketing will send out email communications on open RFPs through targeted email campaigns using Mailchimp linking back to an RFP specific webpage; likewise, program teams might also have their own grantee or prospective grantee information saved in spreadsheets and might send out their own targeted email blasts for grant and engagement opportunities. • Email is our current method to communicate grant recipients' pre-application award and post award (for milestone data tracking and invoicing requirements). • Program team members and staff across the organization can also log into our current

		Grants management system to view the stages from the entry of the grant award request (internal request for approval of selected applicants) through contracting to finally becoming an award to payments. • However, our Workforce Development team's internship contacts live in a separate portal and are currently "walled in" – this team is also developing their own separate workforce CRM and LMS system, so we will need a process to bring them into the broader system.
14	**What are the biggest challenges or pain points you currently experience in communicating with these groups? For example, are there issues with information silos, inefficient processes, lack of personalization, or tracking engagement? [Based on Sections 3, 4]**	Yes, these are the main pain points. However, program teams and marketing and communications do a great job to personalize communications as much as possible.
15	**We understand that the Center sends 2000 emails monthly. Does the MarComms team track unopened emails, blocked emails, etc.?**	To clarify, Marcomms specifically sends approximately 20 email blasts monthly with 2,000 recipients on average. Yes, we do track the outcome of the emails, including those that are unopened and blocked.
16	**You also mentioned "Grantee reporting" within the CRM (Section 6.2). How do you envision using web-based forms and automated notifications to improve communication related to milestone reporting?**	We envision that automated notifications will be sent to grantees to alert them about an upcoming milestone. Grantees should be able to: ▪ Login to submit an application/check on an application ▪ Learn what grants they might be eligible for ▪ Upload additional documentation ▪ Input key grantee metrics (in the portal or in a webform) to satisfy milestone reporting requirements
17	**How many custom webforms do you anticipate being built for grantee reporting?**	• This would vary based on the number of new programs solicited per fiscal year and how data is collected for each of these programs (internal or through a 3rd party for example). • We anticipate we will solicit 50 RFPs this year, some of these will be multi-year. • We anticipate some level of customizable grant applications forms and scoring rubrics to be built for grant application and submission for all programs. Grantee acceptance for programs can range from larger volumes for residential programs, several grantees for smaller pilot projects or demonstrations.
18	**How do you currently track and measure the effectiveness of your communications**	

	with program members and grant recipients? [Based on Sections 3.I, 6.2]	We do not currently do this.

Section: Data Analytics		
#	**Question**	**Response**
19	**What types of data and analytics does MassCEC plan to collect?**	MassCEC collects data on: ▪ Financial data from Business Central and Fluxx systems. ▪ Leveraged funds tracked via spreadsheets. ▪ Grants targeted toward underrepresented populations (in Fluxx) ▪ Grantee metrics (e.g., jobs created, patents awarded, emissions reduction potential); right now, metrics are collected in Excel spreadsheets; Additional or future analytics will be driven by how success is measured across different grant programs ▪ Business Development metrics in investments and engagement activity ▪ Grantee success metrics or program evaluations carried out by 3rd parties are also integral to the types of data and analytics required to measure program impact. We often do not have a clear way to transfer data from 3rd parties (much of the analysis lives in PDF reports, excel spreadsheets, or other databases that we do not have access to).
20	**Can MassCEC provide samples or more detailed requirements of the key dashboards and analytics they envision, especially around climate impact areas and grant program outcomes?**	• We would like to show dollar impact across different organization levels (organization-wide), across our Climate Impact Areas, and then key strategy metrics across each specific climate impact area (emissions, economic development impact, engagement impacts, etc.). • We also intend to track the progress toward the MA Climatetech implementation plan – across key metrics (jobs, employees trained, companies assisted, etc.). • Program management/process management dashboards are also key for program teams, • Draft dashboards are currently in progress using PowerBI. We anticipate some program management/process management dashboards to live in a CRM and/or Grants management system, while we anticipate that additional impact metric (output/outcome) dashboards would live in another visualization tool (most likely PowerBI) with capabilities to bring in

		data from the grants management system, CRM/database as needed.
21	**Are there any specific key operational or business outcomes MassCEC hopes to improve or measure through this effort?**	• One key metric is the average speed of grant making cycle from release of RFP to final contracting with grantees. • See also **"Operational metrics"** on top of page 13 Section 6.2 in the RFP.

Section: Project Funding and Budget		
#	**Question**	**Response**
22	**Are there any foreseeable federal funding changes or challenges that may impact this project?**	MassCEC has received federal funds from programs like the American Recovery & Reinvestment Act and the Inflation Reduction Act. Federal reimbursement processes for MassCEC's projects are currently stable, and there are no anticipated risks affecting this project's funding or continuation.
23	**We would like to see a copy of a previous MassCEC announcement where MassCEC requested grant applications for funding, and can we obtain a copy of a previously funded grant award?**	We have included some examples of the grant applications for funding for several of our ongoing programs below: • InnovateMass Program - The InnovateMass program provides up to $350,000 in grant funding and technical support to applicant teams deploying new clean energy technologies or innovative combinations of existing technologies with a strong potential for commercialization. • Catalyst/Dices- The Catalyst Program provides grants of up to $75,000 to researchers and early-stage companies looking to demonstrate initial prototypes of their climate technologies. • Empower program - MassCEC seeks a qualified contractor or team of qualified contractors to conduct an early-stage outcome program evaluation of the EmPower Massachusetts Program. EmPower Massachusetts offers multiple stages of investment in communities and community-based organizations so that they can explore, develop, and implement program models or projects that provide access to the benefits of clean energy for previously underserved populations.
24	**Is there an approximate budget range that has been set aside for this project?**	No, we will balance upfront implementation and design with long term licensing maintenance, and support costs. The solution should meet the organization's needs with the possibility to expand

		on the solutions over time, as necessary.
25	**Is this project subject to a set-aside for Small Business or Minority-Owned enterprises?**	No.

Section: Implementation and Timeline		
#	**Question**	**Response**
26	**Can you also elaborate on any specific compliance and regulation requirements the solution needs to satisfy?**	Please see Section 7 in the RFP, specifically #s 17-20 on pages 24-25.
27	**How are payments handled between MassCEC and external stakeholders?**	The majority of payment runs are processed via ACH, though for some vendors and grantees we are still sending checks. We do this through our general ledger system (Business Central) (not our grant management system).
28	**Is the expectation that users on the grant-making team would not need to access the CRM as part of Phase 1?**	We would prioritize phasing some of program teams (grant-making teams) for CRM use in phase 1, with a particular focus on teams that are launching new grant programs. However, we are open to discussions about the most logical way to sequence this.
29	**Does Dynamics 365 Business Central integrate with other finance systems?**	Currently we have an integration between Business Central and our Fluxx grant making system.
30	**In the table December 1, 2025, is the anticipated completion for Phase 1. However, there is a reference that the transition from Fluxx will take place during the summer of 2026. Would the Center be opened to a proposed timeline that meet their licensing expiration requirements, but may have different milestones?**	We are open to exploring the most logical and efficient way to sequence milestones keeping in mind the need for transitioning out of Fluxx well before the end of that contract (December 31, 2026).
31	**We saw that the Center wants phase 1 completed by December. How soon would the Center be available to start the project? Would we be able to kick off in June? Are there any constraints to kick off once the award notification?**	The main constraint on our end relates to the time it may take for both parties to finalize a contract. We will have staff available to kick off in June.
32	**Is a faster implementation timeline desirable?**	We are open to the possibility of a faster implementation timeline.
33	**Can project phases be consolidated if a solution meets all requirements?**	Yes, but implementation speed will depend on staff capacity and vendor availability. The goal is to transition out of the current grants management system well before its contract ends in late 2026. While a faster timeline is desirable, it must align with available resources.
34	**Does MassCEC require additional DocuSign licensing for this project, or will existing licensing agreements cover new signature requirements?**	MassCEC would need to understand how the proposed system would integrate with DocuSign prior to determining whether it would require a different licensing structure and agreement.

Section: Integrations		
#	**Question**	**Response**
35	**Will the CRM replace any existing platforms?**	In Phase 1, MassCEC plans to migrate data from its investments team CRM (Affinity) into the new organization-wide CRM. Mailchimp, used for communications, may also be replaced depending on the CRM's capabilities. In Phase 2, the CRM may replace the current grants management system.
36	**What types of reports and data outputs are required for different stakeholders?**	**Reports and dashboards should support:** • Grant program tracking, including lifecycle stages and milestone statuses • Portfolio-level and sub-portfolio-level views for managers. • Program evaluation dashboards to measure impact for internal team members + the MassCEC Board of Directors • Climatetech and organizational program dollar impact dashboards that can be shared with the Board or other External Stakeholders, as needed. • Government Affairs reports detailing project locations across the state. • Email marketing campaigns & events reports for MarComms team • Investment portfolio pipeline & performance for Investments team • Climatetech company customer pipeline for our Business development team • Integration with Power BI, ArcGIS, and Excel for data visualization and mapping.
37	**Should the CRM integrate with other state or public entity systems via API?**	API connectivity to other public entities is a desirable feature but not a top priority.
38	**For each system you imagine integrating (if there are any beyond Workforce Development Solutions Career Edge portal, Fluxx Grants management System, Business Central, and Power BI) how many fields will you need to share among the systems, and will they be mono- or bi-directional? Will integration with external systems be a continuous need or temporary for systems being phased out?**	We intend to explore these questions further with top applicants. • See also Tech Stack section in this Q and A.
39	**Are there any document generation needs (i.e., producing PDFs via CRM data)?**	**For Marketing:** ▪ Contact acquisition source (down to the page level if appropriate) ▪ Content activity – pages visited, conversions, assets downloaded ▪ Contact details – location, interests, programs, or events attended

		For program teams/Investments/Business Development: Grant and business relationship tracking: pulling reports on companies funding, type, technology, demographics, other key insights. Pipeline, Staff Deal Performance, Lead Source Analysis, Call Report, Campaign Performance, Portfolio reports to gain insight into what policies/practices are working well or need improvement **Government affairs:** Legislator information: pulling projects from districts and key insights/metrics, meetings or history with elected officials or other government stakeholders, financial statements **Possibly other reports -** in a demo with top applicants we would like a better understanding with clear examples of the types of reports that could be generated for use across various stakeholder groups
40	**What is the total document volume the solution should be capable of handling?**	We don't have an exact number, but we would need a system with significant capacity considering both historical grant-making and future relevant grant-making documents.
41	**Are there specific integration needs with your website (Drupal, WordPress) for lead capture and communication with potential program members or applicants? [Based on Section 3.I, 6.2, 6.5]**	Yes, there are integration needs from our website - we currently have webforms on both our Drupal (MassCEC.com) and WordPress (Clean Energy Lives Here) sites. Ideally the info from those forms and also forms the program teams are using in MS Forms & JotForm would feed into a CRM. Currently the contact data those forms gather is siloed. • See the Tech Stack section for more information.
42	**Is there an integration framework (i.e., middleware, API, etc.) that the MassCEC is expecting the vendor to use for this? Or is MassCEC open to suggestions from the vendor?**	We are open to suggestions from the vendor.
43	**Will MassCEC require embedded analytics within the system in addition to the integration with Power BI, or would the integration with Power BI be sufficient for the analytics use case?**	Ideally we would like to have both options for different report and tracking needs.
44	**Does MassCEC have a preference for a specific CRM solution (e.g., Salesforce, Dynamics, or a custom build)?**	MassCEC is open to various solutions, balancing functionality, cost, and implementation speed. While out-of-the-box solutions may offer faster deployment, a custom build could better meet specific needs. All options are currently under consideration.
45	**Should the CRM include built-in project management tools, or is integration with**	

	external software preferred?	MassCEC is open to both options.

Section: Legal

#	Question	Response
46	**Are offshore and nearshore resources permitted for the development of the proposed solution?**	We would like our data to be stored in the US. However, we are open to the work to develop the solutions using offshore or nearshore resources. • We would also ideally like the main 24/7 support to be based in the US.
47	**Can respondents leverage existing Massachusetts contract vehicles, such as ITS75 or ITS81, for procurement of this solution?**	No. We do not follow state procurement since we are a quasi-public organization.
48	**Is there a specific historical timeframe required for maintaining records in the new system?**	7 years.
49	**Is there a requirement for vendor registration with any Massachusetts state portal?**	The vendor will be required to register with the Secretary of State. The vendor is not required to register through CommBuys.

Section: Data Quality and Migration

#	Question	Response
50	**Do you need all historical activity migrated to the new CRM or only active activity. Do you need only active grants migrated to the new solution or all historical grants as well?**	We are working on this now. Some level of historical activity will need to be migrated for key business units (Government Affairs, legislative tracking for example). We will most likely want to migrate historical activity associated with our Investments team CRM (Affinity) and possibly information from past Marketing email campaigns (MailChimp).
51	**Are there any known data quality or duplication issues within the current systems that would need remediation before migration?**	• Yes, MassCEC is working to improve data quality issues of key data in Fluxx for eventual migration to a new grants management system in Phase 2 of the project. • We are also currently working with program teams and business units across the company to gather stakeholder information and key data currently tracked in spreadsheets in a centralized spreadsheet tracker. Because of data siloing, we assume program teams are collecting external stakeholder information that could overlap with other departments. Program teams and business units also send stakeholder information to MarComms to go into Mailchimp. There is overlap between program and business unit specific spreadsheets with stakeholder

		information in Mailchimp. • A goal is to clean these data as much as possible and carry out some de-duplication of these data prior to partnering with the successful vendor. However, because information gathering is actively underway, we are still unclear of how far along we will get in this process. As a first step on this process our goal is to know specifically what program teams would like to migrate to a new CRM and then work from there to perform any necessary de-duplication tasks or improve data quality.
52	**How would you describe the quality of your data that needs to be migrated to the new system? Do you believe it needs significant clean up or minimal cleanup?**	• This depends on the business unit or program. For example, the Director of Data and BA has worked very closely with our Emerging Climatetech impact area and Government affairs to clean data and improve quality for eventual migration into a database. • For other business units or programs there is still significant clean up that needs to be done. Again, this is something we are already actively working on internally, focusing on key stakeholder information and data from current program activities.
53	**What is the total volume of data, number of tables, and number of fields that will need to be imported?**	We have currently identified 32 spreadsheets containing approximately 9 columns per sheet and over 100 rows each. Since these files are actively used by employees, we anticipate the volume of data and number of fields to increase, possibly double, because we have yet to complete the inventory process with four of our program teams. This assessment represents our current best estimate of the data migration scope.
54	**For each legacy data source, how many tables and records per table need to be migrated? Please distinguish between reference/lookup tables and tables storing unique record information (e.g., case data).**	• Our data is primarily stored in flat file formats (XLSX, CSV, and TSV). Additional sources include our Mailchimp database containing over 70,000 records and our Fluxx grant management system. • We propose conducting a comprehensive data inventory exercise with the selected vendor to precisely define migration scope and requirements and a clear understanding of de-duplication process for migrated data.
55	**Who will be responsible for extracting data from the legacy systems?**	• Director of Data and BI/Business Analytics team for most data, possibly in

#	Question	Response
		collaboration with key staff from programs and business units. • IT manager/Fluxx data consultant (data quality assurance when migrating from the Fluxx Grants Management System to new grants management system).
56	**Who will be responsible for ensuring data quality assurance of the migrated data?**	Same as above.
57	**Who will be responsible for addressing and remediating any data quality issues identified during migration?**	Same as above.

Section: Grant-making and Grant Volume

#	Question	Response
58	**Please provide more detail on how you review/score grant applications**	• This varies across the organization per program team and per program. • Generally, program teams will define a set of criteria for each program that is listed in the RFP. • In evaluating RFP responses from prospective applicants, program teams will reach out to internal MassCEC reviewers. They may also reach out to external reviewers across different industries to review grants and score applications based on a set of criteria. • Often the set of criteria and scoring takes place in excel spreadsheets. • Communication with internal or external reviewers is done through email and through Teams or Zoom.
59	**Where is the current grant information stored?**	• Grant data is primarily housed in our current grants management system Fluxx, which includes awards, contracts, and historical records dating back to 2013–2014. • Some data tracking for grantee metrics is also stored in Fluxx. • Additional data for tracking success metrics is stored in spreadsheets, which are currently being mapped for potential migration to a CRM or database that can be integrated with the CRM.
60	**How many RFPs for grants do you put out per year?**	We will put out more than 50 RFPs for grants and consulting opportunities this fiscal year.
61	**How many grant applications do you typically receive per RFP?**	Grant application volume varies significantly by award program type and total dollars available. Below are estimates across our 6 grant making programs: ▪ **Tech to Market team:** 200 applications

#	Question	Response
		across 4 grant programs, 60 awards granted. ▪ **Offshore Wind team**: Between 80-100 applications across 2 programs, 18-31 awards granted ▪ **Transportation team:** RFPs for grants between 5-24 applicants, 5-11 awards granted; RFPs for services 1-11 applications, 1 awardee. ▪ **Buildings team** RFPs for grants between 5-30 applicants dependent on program; 5-11 awards granted; RFPs for services 1-11 applications, 1 awardee. ▪ **Net Zero Grid team:** 6-24 applicants, dependent on program, 1-12 awardees. ▪ **Workforce Development team:** 276 applicants across 5 programs**,** 92 grants awarded; Internship program has three sessions per year and makes hundreds of awards.
62	**When do you typically release your annual Funding Announcements - July, August, Sept?**	We release funding announcements/RFPs on a rolling basis throughout our fiscal year.

Section: Tech Stack

#	Question	Response
63	**Is there any expectation of replacing Dynamics 365 Business Central as the general ledger and primary accounting/financial tool or rather providing better reporting leveraging this data?**	• The organization is looking to replace Business Central with another general ledger application, although that is not within the scope of this RFP. We have not yet begun procurement for this.
64	**Are there plans for expanding the system's functionality in future phases (past phase 2) that should be considered in designing the overall solution?**	• One item as implied above would be a future integration with a new general ledger system. Overall, we are focused on building a core architecture and set of workflows that meets most of our current needs across business units and program teams as described in the RFP and can build on the initial functionality as needed; we see this as an iterative process that we can't fully anticipate future needs in a few years' time.
65	**There is a list of technologies that need to be replaced or integrated with. Are these used consistently across programs or sporadically used? What is the entire tech stack for all programs?**	**Current technologies** ○ Grants Management (Fluxx) ○ Business Central (General Ledger) ○ Affinity (Investments CRM) ○ Drupal ○ WordPress

- Mailchimp
- Excel (all stakeholder information currently lives in many Excel documents)
- Other MS365 apps
- Power BI
- ArcGIS
- Surveys/feedback (ex. Survey Monkey)
- DocuSign
- Google Analytics
- Zoom
- Eventbrite
- JotForm
- MS Forms

To be replaced (from list above)

- Grants Management (Fluxx)
- Business Central (not a part of this RFP)
- Excel (all stakeholder information in Excel to be replaced by new CRM)
- Affinity (to be replaced by new CRM)
- Mailchimp (to be replaced by new CRM, if possible, or assume some of MailChimp's capabilities)
- Consolidate JotForm/MS forms use to one application

New technologies (as a part of this RFP or otherwise)

- CRM (Phase 1 of this RFP)
- Database (Phase 1 of this RFP)
- Workforce Development Solutions Platform (separate RFP, Workforce Development specific project, just now kicking off)
- Solution for Financial Operations/New General Ledger (not a part of this RFP)

Integrations: we will work out with the chosen vendor whether integrations will be mono or-bi-directional and map which applications would need to be integrated with each other.

- CRM (new)
- Database (new)
- Grants management (first to be integrated with Fluxx and then a new system as part of planned Phase 2)
- Financial operations (first to be integrated with Business Central and then a new general ledger solution)
- Workforce Development portal
- Mailchimp (if necessary)
- Drupal
- WordPress
- MS365

		○ Power BI ○ ArcGIS ○ DocuSign ○ Excel (limited, to be able to do some analytical work if necessary) ○ MS Forms/JotForm (prior to integration goal will be to choose just one tool) ○ JotForm ○ Eventbrite ○ Zoom
66	**Can you provide more details about how the Finance team uses Dynamic 365 Business Central. Is this just to track grants, how much was disbursed, the remaining amount, etc.? Has the Center documented its workflows?**	Business Central is our general ledger system. We do not use it to track grant-making workflows.
67	**Could you provide more information on the functionality, workflows, etc. related to the Workforce Development Solutions Career Edge?**	Not at this time. They are also right at the beginning stages of their solution development process. We are in close contact with their team and fully intend to collaborate to ensure clear functionalities and workflows between the two systems.
68	**Would the solution replace all of the existing system / software mentioned in the RFP, e.g., Fluxx, Affinity? If so, could the Center describe how the system supports their processes?**	• Ideally, we would like the new solutions across the phases to replace Fluxx, Affinity, and Mailchimp. • The information about how the system currently supports our processes can be found in Sections 3 and 4 of the RFP.

Section: Training and Support

#	Question	Response
69	**Will MassCEC own communication and engagement of impacted stakeholders to prepare them for the adoption of these tools? Would MassCEC be open to proposals that include these services?**	We anticipate that most internal communication and engagement of our stakeholders ahead of implementation would be led by us with support from our vendor. • For example, we would communicate about project goals and key milestones and ask for the vendor to be involved in direct engagement around defining further requirements and training. That said, we are open to different approaches.
70	**Is onsite support required?**	We have a hybrid workplace so we would anticipate training would be remote. We prefer to work with vendors whose key staff are operating in compatible time zones.
71	**How long is the respondent required to provide post-deployment support as part of the warranty period for the solution?**	At least one year post deployment.
72	**How many unique user groups do you**	We would like to collaborate with the vendor to

	anticipate requiring training to adopt the new tools? What is the approximate size of each group?	tailor training for each group.
		• On the program side:
		  ○ Junior level staff will need to be able to enter stakeholder and grant information, possibly track the grant lifecycle and learn how to use specific data: estimate 50-60 employees
		  ○ Higher level program staff: 20-30 employees will need to be able to better track and manage project lifecycle across different levels; some data entry, to pull key reports to show grant progress or other key data/metrics.
		• Business units might require different/more specific trainings for their own purposes
		  ○ Marketing and communications: 12 employees
		  ○ Government relations/external affairs: 5 employees
		  ○ Operations/HR/Office: 5 employees
		  ○ Business Analytics/IT: 5 employees
		  ○ Investments/business development 12 employees
		  ○ Legal: 3 employees

73	**Do you want your OCM, Communications and End User Training Development Provider to be more advisory, a partnership or do you want us to take full ownership?**	Partnership
74	**What is the most effective/preferred ways people learn across your internal and external end user ecosystem today? Instructor Led Training (ILT), Virtual Instructor Led Training (VILT), Web Based Training (WBT) / eLearning, etc.? What doesn't work?**	• Instructor-led training or web-based training with clear examples or walk throughs of key tasks works best. • A required review where the person must answer questions could also be useful to successfully complete training.

Section: Other: Requirements, Workflow and Users		
#	**Question**	**Response**
75	**Approximately how many electronic signatures will be required annually?**	In the last 12 months, 400 envelopes have been sent out.
76	**Will preference be given to CRM solutions that incorporate climate solutions?**	Although it is not a specific selection criterion, MassCEC is open to learning about how vendors manage their data centers and energy usage.
77	**How flexible is MassCEC in adapting existing grant workflows to align with the selected platform’s standard grants management capabilities?**	We will need to assure the right levels of review are possible within the chosen system so that we are in compliance with authorizations from our board as to whom can approve grants, as well as more generally ensure appropriate controls.

78	**Do you anticipate Legal and Finance to be users of the new CRM, and if so, are they included in the overall number of users? What are the overall user numbers for internal and external stakeholders per Phase 1 and Phase 2?**	Yes, we included all employees. • This information is included in the 5.4 licensing and user estimates. External stakeholders (grantees) would be included in phase two. • See also the Training and Support section above.
79	**How many MassCEC staff users will require access to the new CRM as part of Phase 1?**	We first anticipate our business units and Biz Dev/Investments teams to be the first users (40-50 staff); with eventually all staff requiring access to the CRM across different user levels (est. 140 staff).