



Salesforce Architect

R E Q U E S T F O R Q U O T A T I O N

State Term Schedule

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR QUOTATION

Please consider this as the State of Ohio, Department of Administration, Office of Information Technology's (OIT) Request for Quotation for the following consulting position:

Salesforce Architect

The State of Ohio is requesting resume(s) and quotation(s) for an Salesforce Architect. The role is needed from approximately **April 3, 2017, to June 30, 2017, and then approximately July 1, 2017 – March 31, 2018. Timeline is estimated at only one (1) year contract for Salesforce Architect.**

BACKGROUND

The state of Ohio is seeking a Salesforce Architect for Ohio Center of Excellence (COE). A Center of Excellence (COE) is an employee-led group in your organization that comes together to discuss and collaborate on large-scale concepts, granular ideas, tools, and solutions pertaining to a specific platform or business initiative.

The mission of a COE is to focus on creating, developing, and promoting proven practices and ideas that will help streamline processes and improve the quality of both worker and customer experiences. Allows you to enhance the value of your Salesforce investment by providing better access to subject matter experts across the State.

Key Responsibilities and Scope of Activities:

Establish a Center of Excellence (COE) Charter

- Work with Stakeholders to define a COE charter for the State of Ohio.

Ohio's Salesforce Footprint

- Create an Inventory of Salesforce Orgs in the State of Ohio
- Establish and keep ongoing communication with all State Agencies interested in Salesforce
 - Provide help/guidance when needed, oversight into Ohio projects

Establish Ohio Salesforce Best Practices

- Create Best Practices for the State of Ohio, examples:
 - Salesforce Operating Model Setup
 - End to end setup of an entire Salesforce solution, from project intake to project closeout and transition to project support.
 - Environment Management Best Practices
 - A reference document that is leveraged by the COE to establish best practices for environments, including establishing environments, and refresh processes.
 - Enterprise Salesforce Collaboration

- A reference document and creating of services to establish standard methods by which the project team can collaborate with their various support, OIT and UIS support teams, as well as any other relevant project teams.
- Coding Standards
 - Coding standards that developers (both internal and 3rd party project employees) should follow
- Solution Accelerator Library
 - A reference of projects and their existing capabilities that can used to build solutions.
- Shared Solution Development (User Provisioning, Deployment)
 - Solutions developed by the COE for the greater good of the Salesforce platform

Salesforce User Group

- An active participant in the Salesforce user group
 - Work with group to establish monthly agenda
 - Encourage participation and collaboration

Salesforce Training

- Work with State agencies for training needs
- Work on workforce transformation planning, helping Ohio upgrade its workforce for Salesforce application development

Timeline

- One (1) year contract for Salesforce Architect

Qualifications and Education Requirements:

- Must have the Salesforce Architect certification.
- Must be onsite at the State of Ohio, 40 hours a week
- A Technical Architect focused on building necessary technical deliverables of the COE and leading the overall technical deliverable work stream. This senior consultant has 5+ years of consulting and Salesforce project implementation experience, in addition to 5+ years of technical architecture and software development expertise on the Salesforce platform.
- Technical Team Lead for the State's Salesforce COE
- Author the technical documents for COE best practices
- Conduct technical training exercises with client resources.
- Excellent documentation and communication skills.
- Ability to design, implement and modify systems.
- Ability to work effectively in a multi-disciplinary team.

- Strong organizational skills.
- Ability to maintain confidentiality and adhere to mandated privacy/security rules.

ADMINISTRATIVE

DUE DATES

All quotations are due by 1:00 pm, EST, on March 21, 2017. Any quotation received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late quotations will not be evaluated for award.

SCHEDULE OF EVENTS

All times are Eastern Standard Time (EST).

Event	Date
1. RFQ Distribution to Suppliers	March 14, 2017
2. Proposal/Quotation Due Date	1:00 p.m., March 21, 2017
3. Target Date for Review of Proposal/Quotation	March 22, 2017
4. Projected Interview Dates	March 23, 2017 – March 24, 2017
5. Anticipated decision and selection of Supplier	March 24, 2017
5. Anticipated commencement date of work	April 3, 2017

EVALUATION FACTORS FOR AWARD

EVALUATION

The following will be considered in determining the supplier to be selected for this engagement, according to a standardized scoring methodology:

- Relevant experience
 - Relevant skill level
 - Proposed contractor rate(s)
- The contractor will not be permitted to substitute personnel for those submitted for RFQ evaluation (during the RFQ evaluation or at project start-up), except when a candidate's unavailability is no fault of the contractor (e.g., Candidate is no longer employed by the Contractor, is deceased, etc.). Note: If a substitution situation occurs, the proposal will be re-evaluated. If the substitution gives the contractor an unfair advantage during the RFQ process, the proposal may be eliminated or the other suppliers will also be given the chance to submit substitutions of personnel also.
 - All proposals will be evaluated for meeting the requested information. Incomplete proposals will not be reviewed. The proposals that provided the requested information will be evaluated for at least the highest prioritized candidate. The proposals will be scored based on the criteria requested above. We reserve the option to interview the top candidates. Candidate substitutions between the proposal evaluation and interview periods are highly discouraged (see above). If OIT has other qualified candidates, the contractor's proposal requesting a substitution will be denied at this stage and the proposal will be eliminated from evaluation. If OIT does not have enough qualified candidates due to the substitution, all received proposals will be asked to confirm their candidates, given a couple of days to provide replacements, and the entire process will start over.

TERM AND CONTRACT

- The contract will be for **Time and Material** through State Term Schedule (STS) contract and must reflect or be lower than STS rates, and must use STS categories.
- The term will be until June 30, 2017.
- No additional costs, such as travel, meals, lodging, taxes, parking or other associated costs may be charged separately for this work. The supplier's sole compensation for the duties described herein shall be the billings at the supplier's hourly rate.
- All contractors shall read, acknowledge and follow DAS policies, rules and guidelines.
- All work performed by the supplier shall be deemed a "work-for-hire," and shall be the sole property of the State of Ohio. The supplier may not use such work without OIT's written consent.
- Contractors shall use supplier provided equipment (i.e. laptop computers, mobile phones, etc.) and will follow State security policies.

- The contractor, as a component of the project kick-off meeting, will be required to sign any state policy documents that are deemed appropriate by the OIT Division.

STATUS REPORTING

The contractor will provide weekly status reports to the State. The contractor will be responsible for meeting all timelines designated by assigned Salesforce Architect. Weekly timesheets will be reviewed and signed by the OIT Salesforce Architect. Invoices must be accompanied by timesheets and submitted monthly for payment.

NON-DISCLOSURE AGREEMENT

Both candidate and company will be required to sign a non-disclosure agreement which prevents disclosure of any data obtained while on the engagement which can be used to personally identify any parties at any time either during or after the engagement.

GUIDELINES FOR QUOTATION PREPARATION

QUOTATION SUBMITTAL

Each Supplier must submit three (3) complete, sealed and signed copies of its quotation (excluding cost information), and each quotation must be clearly marked "Salesforce Architect" on the outside of its envelope along with Suppliers name.

The cost information MUST be signed, and submitted in a SEPARATELY SEALED ENVELOPE.

The envelope must be clearly marked "Salesforce Architect" on the outside of its envelope along with the Supplier's name.

A single electronic copy of the complete quotation must also be submitted with the printed quotations. ***Electronic submissions should be on a CD, DVD or USB memory stick.*** **The electronic copy MUST be submitted in a SEPARATELY SEALED ENVELOPE.**

Each proposal must be organized in the same format as described below. Any material deviation from the format outlined below may result in a rejection of the non-conforming proposal. Each proposal must contain an identifiable tab sheet preceding each section of the proposal. Quote should be good for a minimum of 45 days.

- Cover Letter (include email address)
- MBE or EDGE Certification – if applicable
- State Term Schedule Number
- STS Labor Category Code
- Candidate Information:
 - Position References (3 minimum) - form
 - Candidate Resume(s)
 - Additional candidate Information (optional) – supplier form
- Candidate Hourly Rate
- Conflict of Interest Statement
- Payment Address
- Proof of Insurance

- W-9 Form

The State will not be liable for any costs incurred by any offeror in responding to this RFQ, even if the State does not award a contract through this process. The State may decide not to award a contract at the State's discretion. The State may reject late quotations regardless of the cause for the delay. The State may also reject any quotation that it believes is not in its interest to accept and may decide not to do business with any of the Suppliers responding to this RFQ.

Quotations MUST be submitted to the State's Procurement Representative:

Ms. Nychola Richardson
30 East Broad Street, 39th Floor
Columbus, OH 43215

PROPRIETARY INFORMATION

All quotations and other material submitted will become the property of the State and may be returned only at the State's option. Proprietary information should not be included in a quotation or supporting materials because the State will have the right to use any materials or ideas submitted in any quotation without compensation to the Supplier. Additionally, all quotations will be open to the public after the contract has been awarded.

The State may reject any Proposal if the Supplier takes exception to the terms and conditions of this RFQ.

WAIVER OF DEFECTS

The State has the right to waive any defects in any quotation or in the submission process followed by a Supplier. But the State will only do so if it believes that is in the State's interest and will not cause any material unfairness to other Suppliers.

REJECTION OF QUOTATIONS

The State may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that the State believes is excessive in price or otherwise not in its interest to consider or to accept. The State will reject any Non-STS responses. The State reserves the right to reject proposals from suppliers who provide services as a subcontractor under, or who have otherwise been involved in, the State of Ohio Integrated Eligibility and HHS Business Intelligence RFP #0A1103 and #0A1115. In addition, the State may cancel this RFQ, reject all the quotations, and seek to do the work through a new RFQ or other means.

EVALUATION OF QUOTATIONS

Clarifications and Corrections

During the evaluation process, the State may request clarifications from any Supplier under active consideration. It also may give any Supplier the opportunity to correct defects in its quotation. But the State will allow corrections only if they do not result in an unfair advantage for the Supplier and it is in the State's best interest.

Requirements

This RFQ asks for responses and submissions from Suppliers. While each criterion represents only a part of the total basis for a decision to award the contract to a Supplier, a failure by a Supplier to make a required submission or meet a requirement will normally result in a rejection of that Supplier's quotation. The value assigned to each criterion is only a value used to determine which quotation is the most advantageous to the State in relation to the other quotations that the State received. It is not a basis for determining the importance of meeting any requirement to participate in the quotation process.

The evaluation process **may** consist of up to three distinct phases:

1. The procurement representative's initial review of all quotations for defects;
2. The evaluation committee's evaluation of the quotations; and
3. Interviews (optional).

Initial Review

The procurement representative normally will reject any incomplete or incorrectly formatted quotation, though the procurement representative may elect to waive any defects or allow a Supplier to submit a correction. If a late quotation is rejected, the procurement representative will not open or evaluate the late quotations. The procurement representative will forward all timely, complete, and properly formatted quotations to an evaluation committee, which the procurement representative will chair.

Committee Review of the Quotations

The State's review committee will evaluate and numerically score each quotation that the procurement representative has forwarded to it.

The evaluation will result in a point total being calculated for each quotation. Those Suppliers submitting the highest-rated quotations may be scheduled for the next phase. The number of quotations forwarded to the next phase will be within the committee's discretion, but regardless of the number of quotations selected for the next phase, they will always be the highest rated quotations from this phase.

At any time during this phase, the State may ask a Supplier to correct, revise, or clarify any portions of its quotation.

The State will document all major decisions in writing and make these a part of the file along with the evaluation results for each quotation considered.

Once the technical merits of a quotation are considered, the costs of that quotation will be considered. But the State may also consider costs before evaluating the technical merits of the quotations by doing an initial review of costs to determine if any quotations should be rejected because of excessive cost. And the State may reconsider the excessiveness of any quotation's cost at any time in the evaluation process.

Interviews

The State may record any presentations, demonstrations and interviews.

An on-site interview will be required prior to the selection of a candidate.

Determination of Responsibility

The State may review the highest-ranking Suppliers or its key team members to ensure that the Supplier is responsible. The Contract may not be awarded to a Supplier that is determined to be not responsible. The State's determination of a Supplier's responsibility may include the following factors: the Supplier's and its key team members' experience, past conduct on previous Contracts, past performance on previous Contracts, ability to execute this contract properly and management skill. The State will make such determination of responsibility based on the Supplier's quotation, reference evaluations and any other information the State requests or determines to be relevant.

Changing Candidates

The major criterion on which the State bases the award of the contract is the quality of the Supplier's candidate(s). Changing personnel after the award may be a basis for termination of the contract.

Contract Award Process

It is OIT's intention to award one contract under the scope of this RFQ and as based on the RFQ Calendar of Events schedule, so long as OIT determines that doing so is in the State's best interests and OIT has not otherwise changed the award date. Any award decision by OIT under this RFQ is final. After OIT makes its decision under this RFQ, all Proposers will be notified in writing of the final evaluation and determination as to their proposals.

OIT anticipates making one award depending on program needs and the fit of the Proposer to the scope of this RFQ.

ATTACHMENT ONE

PERSONNEL PROFILE SUMMARY

CANDIDATE REFERENCES

Candidate's Name:

References

Provide three references for which the proposed candidate has successfully demonstrated meeting the requirements of the RFQ on projects of similar size and scope in the past five years. The name of the person to be contacted, phone number, company, address, brief description of project size and complexity, and date (month and year) of employment must be given for each reference. These references must be able to attest to the candidate's specific qualifications.

The reference given should be a person within the client's organization and not a co-worker or a contact within the offerors organization.

If less than three references are provided, the offeror must explain the reason for the shortage. The State may disqualify the Proposal if fewer than three references are given.

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:	Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year	
Description of services provided that are in line with those to be provided as part of this Project:			
Description of how client project size and complexity are similar to this project:			

ATTACHMENT ONE

PERSONNEL PROFILE SUMMARY

CANDIDATE REFERENCES CONTINUED

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year
Description of services provided that are in line with those to be provided as part of this Project:			
Description of how client project size and complexity are similar to this project:			

Client Company:	Client Contact Name:	Client Contact Title:	
Client Address:		Client Contact Phone Number:	
Project Name:		Beginning Date of Employment: Month/Year	Ending Date of Employment: Month/Year
Description of services provided that are in line with those to be provided as part of this Project: Description of how client project size and complexity are similar to this project: 			