

REQUEST FOR QUOTATION

State Term Schedule

Ohio Department of Developmental Disabilities, Office of Information Technology Services Request for Quotation for the following IT consulting services:

Salesforce Architect

Deliverables as identified below

Adherence to the following supplements:

- **Supplement A – State IT Policy, Standard and Service Requirements**
- **Supplement S – State Information Security and Privacy Requirements, State Data Handling Requirements**

Deadline for submitting Response: May 29, 2020 at 1:00 P.M.

Estimated Commencement Start Date: July 1, 2020

Estimated End Date: June 30, 2021

The Department of Developmental Disabilities is seeking a Salesforce systems architect to establish processes and standards for the implementation of Salesforce. In addition, there is a need to provide quality assurance and assistance with the implementation of the first application and to implement the technical architecture for continuous deployment of Salesforce applications. Work will also comprise assessing current applications, defining the architecture for migrating to Salesforce and cross platform integration.

This effort is to design and configure the infrastructure starting with the networking and supporting software for the Salesforce Architecture as well as integration with the Microsoft Dynamics 365 platform and .Net applications. The architect will also implement the application lifecycle management standards and processes for deployment and source code change management, integration and configuration of user security with Azure Active Directory and the state single sign on. Other work includes assisting with using Business Capability Modelling artifacts to facilitate Business and IT Strategic planning to migrate solutions to the Salesforce platform and responsible for implementing the Salesforce architectural standards to ensure that best practices are implemented for development and maintenance of Salesforce solutions. In addition, this individual will conduct research, technology evaluation and tool comparison and operationalize technology and application standards to support the Salesforce architecture.

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Deliverables

1. Architecture Strategy for DODD Salesforce Organization(s);
2. Architecture Diagram for DODD Salesforce Applications and Integrations with existing applications;
3. API (Application Programming Interface) Management Strategy;
4. Roadmap for security, integration and migration;
5. Document and Implement Development Standards;
6. Security Plan including Account Management Strategy for authenticated and public users;
7. Change Management and Release Management Standards & Processes;
8. Identify and Implement the appropriate Marketplace Tools and best practices for use;
9. Develop an Integration Strategy with existing Microsoft .net and Dynamics 365 Solutions using Azure Logic Apps and Microsoft API manager tools;
10. Reporting and Data Warehouse Integration Strategy;
11. Data Conversion/Migration Strategies.

In Scope:

1. Provide strategic consultation to business and IT management and aligning technology with strategies as well as in researching, internally marketing and enabling the use of standard technologies based on customer requirements including but not limited to Salesforce, Azure, SharePoint, Dynamics 365, Microsoft Azure DevOps, Flosum, and other third-party solutions.
2. Create IT Strategies, standards, naming conventions and guidelines by collaborating with subject matter experts across different IT teams
3. Design the architectural plan and provide leadership for implementing Salesforce and the integration with Azure and Dynamics365.
4. Participate in business opportunity identification and business innovation portfolio development by conducting research, leveraging emerging technologies and adhering to market trends.
5. Participate in enterprise architecture development, including business architecture, information architecture, application portfolio and technical architecture and create models to drive informed business and IT decisions for the use of Salesforce.

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6. Conduct training sessions for state staff on Salesforce standards and systems integration, performance and monitoring for knowledge transfer of operations to state staff.

Expected Experience

The proposed team member is expected to be highly skilled in Salesforce technical architecture, Salesforce Organization configuration, security and data integration with non-Salesforce platforms.

Salesforce Technical Architect

- Bachelor's degree in Computer Science, Information systems or related discipline, or equivalent and extensive related project experience; Master's degree preferred;
- Seven years of Information Technology experience with a minimum of three in Enterprise Architecture role;
- Minimum of five years of hands-on design and implementation experience in IT, with knowledge in a minimum of two of the following technical disciplines:
 - Application development using .net, C##, Java, Mobile design, SQL, API development, application security and Active Directory, source code versioning and change management using TFS/DevOps;
- Current Salesforce experience:
 - Minimum three (3+) years of experience configuring Salesforce.
 - Salesforce certifications for Admin, Architect, Sales, Service and Developer
 - Knowledge of data integration tools and experience integrating Salesforce with different business systems (ETL, CPQ, marketing automation, reporting, etc.);
 - 3+ years CRM experience, the majority specifically with Salesforce;
 - Strong knowledge and experience of Salesforce development, configuration, and management capabilities;
 - Strong knowledge of CRM software quality assurance best practices and methodologies;
- Microsoft Azure experience:
 - Three (3) + years of experience with Microsoft Azure;
 - Training/Certification in Microsoft Azure DevOps;
 - Two (2) + years leading and/or performing implementations of DevOps in Microsoft Azure;
- Experience in implementing and use of GIT, Jenkins, Docker and similar tool sets;
- Exposure to multiple, diverse technologies and processing environments;
- TOGAF, ITIL, COBIT and similar certifications;

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Response Format:

The quotation for this engagement must include a detailed schedule and outline of what the deliverables are for each defined unit of work. The quotations for this engagement will be evaluated based on the described approach and artifacts to be created.

Payment for work will be based upon deliverables and the quotation must contain a payment schedule that clearly states the deliverables and their respective cost. Quotations that simply state the total # number of hours and a cost will be rejected.

The evaluation will take into consideration how well the quotation presents an understanding of the project and the proposed deliverables in conjunction with the timeline and skill sets presented.

Schedule

Normal business hours (between 8:00 AM and 5:00 PM) Monday through Friday, forty (40) hours per week. Contractors may be required to work additional hours based on operational need with DODD prior approval. Onsite work will be performed at Rhodes State Office Tower, Columbus Ohio 43219.

DUE DATES

All quotations are due by 1:00 pm, EST, on May 29, 2020. Any quotation received after the required time and date specified for receipt shall be considered late, non-responsive, and will not be considered.

SCHEDULE OF EVENTS

All times are Eastern Standard Time (EST).

1. RFQ Distribution to Offerors' May 8, 2020
2. Contractor Q&A Period Closes May 22, 2020
3. Quotation Due Date May 29, 2020 1:00 pm, EST
4. Target Date for Review of Quotation June 1– June 5, 2020
5. Anticipated Commencement date of work July 1, 2020

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QUOTATION SUBMITTAL

IMPORTANT NOTE: DODD will only consider quotes that have the following required information:

Each quotation must be organized in the format as described below. Any material deviation from the format outlined below may result in a disqualification of the quotation. Each quotation must contain an identifiable tab sheet preceding each section of the quotation.

1. Cover Letter containing the following information:
 - a) Contact person, address, phone number, and email address;
 - b) A list of any subcontractors that will be working on the project;
 - c) A statement certifying the Offeror is a business entity and will not submit the Independent Contractor/Worker Acknowledgement to the ordering agency;
 - d) State Term Schedule Number and STS Labor Category Code;
 - e) A statement acknowledging that the Standard Affirmation and Disclosure Form (Executive Order 2019-12D) that was signed during the State Term Schedule submission remains in effect; and
 - f) A statement acknowledging that the Offeror understands that changing personnel after the award without DODD consent may be a basis for termination of the award.
2. MBE Certification;
3. Company profile (history, past & current clients);
4. Candidate Resume(s) and Position References (3 minimum);
5. Deliverables Approach Summary outlining how the objectives of the engagement will be met;
6. For each deliverable, a description, estimated time to complete and cost;
7. Conflict of Interest Statement;
8. Payment Address;
9. Acknowledgement and Acceptance of Supplements:
 - Supplement A – State IT Policy, Standard and Service Requirements;
 - Supplement S – State Information Security and Privacy Requirements, State Data Handling Requirements.

DODD will not be liable for any costs incurred by any Offeror for responding to this RFQ and DODD is not obligated to award a purchase order for this solicitation. DODD will reject late proposals regardless of the cause for the delay and may reject any proposal that it believes is not in its best interest of DODD.

It is the responsibility of the Offeror to remove all personal confidential information (such as home addresses and social security numbers) of proposed staff and/or of any subcontractor and subcontractor staff from resumes or any other part of the proposal.

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Offerors' must provide the proposal in PDF format and email to DODD with a subject line of "Proposal for DODD Salesforce Architect".

Email Submission must be to: Kim.Lewis@dodd.ohio.gov

NON-DISCLOSURE AGREEMENT

All resources assigned to this work by the Offeror may be required to sign a non-disclosure agreement. The agreement prevents the disclosure of any confidential data obtained while on the engagement and prevents disclosure during and after the engagement.

PROPRIETARY INFORMATION

All quotations and other material submitted to DODD in response to any procurement effort shall become the property of DODD. Proprietary information should not be included in a quotation or supporting materials because DODD will have the right to use any materials or ideas submitted in any quotation without compensation to the Offeror. Any quotations received in response to this RFQ that have been opened, reviewed, and considered by DODD are deemed to be public records pursuant to ORC 149.43.

DODD may reject any Quotation if the Offeror takes exception to the terms and conditions of this RFQ.

WAIVER OF DEFECTS

DODD has the right to waive any defects in any proposals or in the submission process followed by an Offeror and will only do so if it believes that it is in the best interest of DODD and will not cause any material unfairness to other Offerors'.

REJECTION OF QUOTATIONS

DODD may reject any quotation that is not in the required format, does not address all the requirements of this RFQ, or that DODD believes is excessive in price or otherwise not in its best interest to consider or accept. In addition, DODD may cancel this RFQ, reject all the proposals, and seek to do the work through a new RFQ or other means.

AWARD

DODD will recommend for award for a proposal based on the Offeror having a current STS contract with the State of Ohio and a proposal that provides the best technical resources and that clearly addresses the staffing capabilities and ability to meet deliverables requirements.