

**Colorado Statewide
Internet Portal Authority**

**Request for Proposals (RFP)
Solicitation No. 23-001**

**Salesforce Implementation
and Integration Services**

Issue Date:	March 15, 2023
Proposal Due Date:	April 21, 2023 3:00pm MST



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1. Objective

This Request for Proposals (RFP) is issued by the Colorado Statewide Internet Portal Authority (SIPA) to solicit proposals from interested Offerors to provide comprehensive **Salesforce Implementation and Integration Services** that SIPA will make available to all Eligible Governmental Entities within Colorado, as allowed in C.R.S. § 24-37.7-101, et seq. As a result of this RFP, SIPA expects to select a limited number of qualified Offerors with whom to negotiate. **Section 8. Evaluations, Negotiations, and Award** contains more information regarding the evaluation and Offeror selection process.

SIPA was created in 2004 by an act of the Colorado State Legislature to provide efficient and effective services for citizens through modern business practices and innovative technology solutions. SIPA provides its services to state agencies and local governments, which are known as Eligible Governmental Entities (EGE's) as defined in C.R.S. §§ 24-37.7-101(5) and (6). SIPA currently serves over 860 government entities within Colorado, consisting of state agencies, municipalities, counties, public institutions of higher education, public K-12 school districts, and special districts. Per SIPA's statute, all government entities within Colorado are authorized to contract with SIPA for electronic information, products, and services offered by SIPA.

	<h3 style="text-align: center;">Current Government Customers</h3> <ul style="list-style-type: none"> ● State Agencies or Offices (44) ● Counties (56) ● Municipalities (193) ● Metropolitan Districts (243) ● Water & Sanitation Districts (100) ● Fire Districts (47) ● School Districts (34) ● Institutions of Higher Education (14) ● Other Special Districts (131)
<p style="text-align: center;">SIPA serves many governments and government types across Colorado</p>	

SIPA does not receive any appropriation from the Colorado General Assembly. SIPA is self-funded through its partnership with its Portal Integrator and through the sales of electronic information, products, and services to Colorado governments. Current offerings are described at <https://sipa.colorado.gov/services>.

The purpose of this RFP is to augment SIPA's Salesforce Implementation and Integration Services portfolio by awarding contracts to a limited number of qualified suppliers who can provide a broad range of Salesforce Implementation and Integration solutions.

Through this RFP process SIPA desires to:

- Award contracts to a limited number of qualified suppliers who can provide a comprehensive array of Salesforce Implementation and Integration services to large and small Colorado governments.
- Award contracts that provide competitive pricing, outstanding customer service, industry-leading solutions, and strong account management.
- Create a portfolio of competitively solicited contracts with suppliers providing Salesforce Implementation and Integration services.
- Award contracts to suppliers who will invest in partnering with SIPA.
- Award contracts to suppliers who understand the value to themselves and to Colorado governments of utilizing SIPA as the preferred market channel to Colorado governments.

2. Minimum Requirements

Offeror must meet the following minimum requirements to be considered eligible to receive a contract resulting from this RFP:

1. The Offeror must meet all Offeror Eligibility requirements (**Attachment 1, Section 3A**).
2. The Offeror must meet the Proposal Integrity requirements (**Attachment 1, Section 3B**).
3. Offeror must demonstrate at least three (3) years of experience providing Salesforce Implementation and Integration Services ideally to government entities (**Attachment 1, Section 5**).

Failure of an Offeror to disclose any information in response to the minimum requirements may result in SIPA's determination that the Offeror is not reasonably eligible for award.

Requirements set forth in this **Section 2** are continuing requirements throughout the RFP process and awarded contract(s), including any contract extensions. SIPA reserves the right to determine an Offeror's eligibility based on factors such as financial, material, or personnel resources and expertise, satisfactory record of performance, satisfactory record of integrity, and status of debarment.

3. Scope

A. Required Services

SIPA intends to contract with the successful Offeror(s) to provide Salesforce Implementation and Integration services to Colorado Eligible Governmental Entities in accordance with the Master Services Agreement (MSA) and related Exhibits provided in this RFP.

B. Accessibility

Products, applications, and websites that will be used by Colorado state employees or members of the public must comply with all local, state, and federal law, rules, and regulations.

Learn more: <https://oit.colorado.gov/accessibility>

C. Form of Contract

The final terms and conditions of any Contract will be agreed upon during negotiation. However, the minimum standard terms and conditions that will be included in any awarded Contract are contained in the Master Services Agreement included with the RFP documents.

D. Term of Contract

SIPA anticipates that the term of the Contract will be a three (3) year term with up to three (3) optional renewals of up to one (1) year each to be exercised by SIPA at its discretion. A copy of SIPA's MSA is attached for reference.

SIPA reserves the right to make changes to the MSA and Exhibits.

4. Statement of Work

A. Salesforce Implementation and Integration Services

SIPA is seeking to contract with a limited number of Offerors who provide the widest breadth of Salesforce Implementation and Integration services to SIPA customers. SIPA will award contracts to the optimal number of suppliers to create a portfolio reflective of this desired breadth.

Below is a description of representative, but not exhaustive, Salesforce Implementation and Integration services SIPA may contract for through one or more awarded suppliers. However, Offerors are encouraged to include in their response to the Statement of Work any additional capabilities, services, or solutions they wish SIPA to consider as part of an award.

In providing the response to this Statement of Work, offerors should reference their capability to address, at a minimum, the following:

- Expertise in designing, integrating, implementing, and providing technical improvements to new or existing Salesforce solutions
- Experience developing Salesforce solutions that are Payment Card Industry (PCI), Criminal Justice Information Services (CJIS), Family Educational Rights and Privacy Act (FERPA), and/or Health Insurance Portability and Accountability Act (HIPAA) compliant
- Experience implementing and integrating Salesforce third-party applications
- Capability to provide required solution-specific components of implementations and integrations, which may include one or more of the following services:
 - Environmental assessment
 - Scoping and planning
 - Configurations
 - Development
 - Data migration
 - Testing
 - Deployment
 - Solution support
 - Documentation
 - Training

SIPA reserves the right to allow awarded suppliers to only market, sell, and support, through its SIPA contract, those Salesforce Integration and Implementation services which SIPA, in its sole discretion, determines align with the SIPA mission of providing efficient and effective resident facing services through innovative technology solutions.

B. Account Management

Customer Service

Customer service is critical to the satisfaction of SIPA's customers. Offeror must provide a narrative describing its approach to customer service, including its approach to issue resolution and issue escalation, customer engagement, and where customer engagement and/or sales prospecting will intersect with appropriate SIPA personnel.

Account Management Team

Offeror must provide a narrative describing the account management personnel assigned to the SIPA account, to include, at minimum, job titles, responsibilities, and an organizational chart showing the titles and names of Offeror staff who will engage with SIPA during the sales, project execution, and overall relationship activities. Include the primary point of contact for the sales, project management, senior technical personnel, and administrative (billing/payments) functions.

Administrative Workflows (Quotes/Purchase Orders/Billing/Payments)

SIPA's business model requires suppliers to present initial quotes to SIPA (**NOT** directly to customer) once an agreed upon service or Statement of Work has been requested. One quote or statement of work will have customer facing pricing, while the other will have SIPA's discount. SIPA then provides a quote to the customer. After the customer provides a Purchase Order to SIPA, SIPA then executes the discounted agreement with the supplier. The invoicing and payment processes follow the same steps. Offeror must

provide a statement acknowledging this process and agreeing to work with SIPA to continuously improve these workflows, as part of their Statement of Work response.

SIPA - Supplier Relationship

SIPA views its relationships with its suppliers as a critical component of its overall business model. SIPA expects an awarded Offeror to similarly value the opportunity to build a mutually beneficial relationship with SIPA. Suppliers partner with SIPA to:

- Identify and deliver innovative technology solutions
- Participate in the annual SIPA User Conference
- Participate in joint marketing activities

Offeror should provide a statement acknowledging its approach to partnering with SIPA as part of their Statement of Work response.

5. Offeror Experience and Past Performance

A. Offeror Experience

Offeror must provide a narrative describing its experience in working with accounts of similar scope and scale, including experience with government accounts of all size and type (i.e., state agencies, municipalities, counties, public K-12 and higher education, and special districts). **A template is provided in Attachment 1 Section 5.**

B. Past Performance

Offeror must provide three (3) client references that exhibit a positive capability and experience with accounts of a similar size, scope, and complexity, preferably within the government sector in Colorado. A template is provided in **Attachment 1 Section 6.**

6. Pricing

SIPA suppliers are expected to provide SIPA EGE customers with competitively priced services and solutions. Procuring supplier services through SIPA should always be the preferred procurement path for SIPA customers. SIPA's statute makes it easy for Colorado governments to procure its services without the need for any additional formal procurement activities. As described in the MSA, SIPA prepares customer facing quotes on behalf of suppliers. Suppliers invoice SIPA, and SIPA invoices EGE customers. EGE Customers pay SIPA, and SIPA pays suppliers.

SIPA receives an additional discount on all supplier services for SIPA EGE customers as outlined in **Attachment 1 Section 7.** This additional discount allows SIPA to offset the costs associated with contract management, project management, invoicing, and to provide other digital government services.

SIPA reserves the right to negotiate individual pricing components with those Offerors selected for award. Offerors must provide pricing details per the instructions in **Attachment 1 Section 6.**

7. General Information

A. Point of Contact

Kara Finch is the sole point of contact for this procurement. Any correspondence related to this RFP must be directed as follows:

Kara Finch
 Contract Manager and Legislative Liaison
 Colorado Statewide Internet Portal Authority
 Phone: 720-208-0179
 Email address: itn@cosipa.gov

Offerors shall make no contact concerning this RFP with other SIPA staff or members of the SIPA Board of Directors. **Failure to comply with this requirement may result in disqualification.** Communication with SIPA staff concerning normal course of business, not related to this RFP, is allowed.

B. Schedule of Events

SIPAs intends to follow the schedule of events shown Table 1: Schedule of Events. SIPA reserves the right to modify these dates at any time. Prospective Offerors will be notified of modifications to the schedule via the SIPA website. It is the responsibility of Offerors to monitor the website for schedule modifications. The website does not provide automatic notification of changes to the Offerors.

Table 1: Schedule of Events

Activity	Deadline
RFP Posting Date	March 15, 2023
Deadline for Submitting RFP Questions	March 22, 2023 (3:00 p.m. MST)
Response to RFP Questions Posted	March 31, 2023 (5:00 p.m. MST)
Deadline for Submitting Proposal	April 21, 2023 (3:00 p.m. MST)
Proposal Evaluations	April 25-May 9, 2023
Supplier Negotiations	May 11-19, 2023
Contract Negotiations	May 22-June -9, 2023
RFP Award and Contract Execution	June 2023
Contract Commencement	June 2023

C. Written Questions and Official Answers

Offerors shall submit all questions regarding this RFP by using the Google form found [here](#). Questions regarding this RFP will be accepted until the date and time specified in the table above. Official answers will be posted to the SIPA website in the form of an addendum by the date and time outlined above.

D. Proposal Deadline and Submission Requirements

Offerors are required to submit proposals in accordance with the requirements outlined in this document. Offerors must submit their proposals to itn@cosipa.gov. No hard copy submittals will be accepted for work under this RFP. Proposals must be received by SIPA on or **before** the date and time specified in **Section 7.b General Information – Schedule of Events**. Proposals must be delivered electronically as described in **Section 7.e General Information – Submission Method**.

Offerors are responsible for ensuring SIPA receives the Offeror's complete proposal on or before the proposal submission deadline. **Proposals received after the submission deadline will not be opened and will be rejected as a late proposal unless otherwise permitted by SIPA.**

It is the Offeror's responsibility to ensure timely submission of proposals by the deadline specified in this RFP. Reasonably foreseeable problems inherent in the delivery of proposals are not extraordinary circumstances permitting acceptance of late proposals.

E. Proposal Instructions

Solicitation Clarity

Offeror must carefully examine the solicitation. Offeror is responsible for securing any additional information needed to gain a clear and full understanding of the requirements from the SIPA point of contact.

Submission Method

Proposals must be sent to itn@cosipa.gov. Electronic proposals are required and must be submitted via email. Non-submission of any of the requested information may disqualify the Offeror's proposal from further consideration by SIPA.

No Marketing Materials Desired

Unnecessarily elaborate brochures or other presentations beyond those requested and sufficient to present a complete proposal **are discouraged**. Offerors are encouraged not to provide materials beyond what is required in this RFP.

F. Proposal Format

Offeror shall organize its proposal described below and outlined in Attachment 1:

1. Signed Offeror Identity Form (**Attachment 1, Section 1**). **Please attach as a separate PDF.**
2. **The following information can be submitted as a single PDF or Word Document.**
 - a. Executive Summary (**Attachment 1, Section 2**). The executive summary should provide a brief written overview of the Offeror's company and proposed solution. The executive summary shall not exceed four (4) pages in length. No appendices or specific references to additional information will be accepted. The executive summary should be written to communicate a summary of the Offeror's proposal. The Offeror must not include any pricing information or estimated savings in the executive summary.
 - b. Responses to Offeror Eligibility and Response Integrity in **Attachment 1, Sections 3A and 3B**. This section shall not exceed five (5) pages.
 - c. Response to Statement of Work. This section should not exceed eight (8) pages. The template for this section is **Attachment 1, Sections 4A and 4B**.
 - i. Salesforce Implementation and Integration services as described in **Section 4A** of this document.
 - ii. Response to Account Management as described in **Section 4B** of this document.
 - d. Response to Offeror Experience – provide narrative as described in **Attachment 1 Section 5**. This section should not exceed four (4) pages.
 - e. Response to Past Performance – provide three (3) Offeror References in **Attachment 1, Section 6**. This section should not exceed three (3) pages.
3. Response to Pricing. Complete the Pricing Worksheet in **Attachment 1, Section 7** and submit as a **separate PDF**.
4. MSA Exceptions. Please include a red-lined version of the MSA. Offeror understands that any redlines are for consideration only and will be finalized during contract negotiations. If an Offeror intends to redline the MSA, Offeror must submit a redlined MSA as part of their proposal. If the Offeror has no exceptions to the MSA, the Offeror should state that at the time of their submission.

Note that an excessive number of exceptions to the MSA will be a factor in evaluating proposals. SIPA may deem a proposal non-responsive if an excessive number of exceptions to the MSA are submitted.

Redlines will not be accepted or negotiated outside of those redlines submitted as part of the original proposal submission. **Please submit as a Word**

Document with changes tracked.

G. Addenda to the RFP

SIPA will not be bound by any oral statement or representation contrary to the written specifications of the RFP. Any revision, clarification, or interpretation pertaining to the RFP will be in writing and issued by SIPA as an Addendum. Any change or interpretation not in an Addendum will not legally bind SIPA. Any Addendum will be posted to the SIPA Website.

H. Right to Amend or Withdraw the RFP

SIPA reserves the right to alter, amend, or modify any provision of this RFP, or to withdraw this RFP, in whole or in part, at any time prior to award and contract execution if doing so is in the best interest of SIPA. SIPA reserves the right to re-solicit for like or similar products and services whenever it determines re-solicitation to be in its best interest.

Any changes or additional information regarding this RFP will be posted as an Addendum on the SIPA website. It is the responsibility of Offerors to monitor the website for any Addendum. Offeror's failure to periodically check the website will in no way release the Offeror from the terms of the Addendum or additional information resulting in additional costs to meet the requirements of the RFP.

I. Pre-agreement Costs

SIPA shall not be responsible or liable for any costs incurred by any Offeror in the preparation and submission of its proposal to this RFP or for other costs incurred by participating in this procurement process.

J. Ownership of Proposals

All proposals become the property of SIPA. SIPA reserves the right to use any and all information or materials presented in response to this RFP. Disqualification of an Offeror's proposal does not eliminate this right.

K. Confidentiality of Submissions

SIPA is subject to the requirements of the Colorado Open Records Act (CORA), C.R.S. § 24-72-201, *et seq.* All disclosure and withholding of information submitted will be handled pursuant to CORA.

L. News Release

Offeror-initiated news releases pertaining to this RFP shall not be made without prior written approval of SIPA, in its sole and absolute discretion. A minimum of ten (10) business days written notice is required for such approval.

8. Evaluation, Negotiations, and Award

A. Evaluation of Proposals

SIPA will review proposals to determine responsiveness to this RFP. All determinations about responsiveness to this RFP are final. SIPA may request up to 3 years of financial statements to conduct financial review of Offerors with responsive proposals. At any time during the evaluation process, SIPA may ask any or all Offerors to elaborate on or clarify specific points or portions of the proposal. SIPA's request and the Offeror's response shall be in writing.

B. Evaluation Criteria

SIPA will use the following criteria to evaluate proposals and determine the best value:

Evaluation Criteria
<p>Salesforce Implementation and Integration Services Quality and breadth of Salesforce Implementation and Integration Services.</p>
<p>Account Management Offeror's strategy to provide an effective Account Management structure, including customer service account management team, efficient administrative workflows, and partnership with SIPA to create a strong working relationship.</p>
<p>Demonstrated Experience with Similar Scale and Complexity Offeror demonstrated ability to provide Salesforce Implementation and Integration Services to small and large governments as described in this RFP. Review will include Offeror size, industry track record, references, and managerial and technical capacity.</p>
<p>Past Performance Client references which demonstrate that the Offeror has the ability and experience to provide all of the services and account management requirements as described in this RFP.</p>
<p>Pricing Proposal A pricing proposal that reflects a willingness to partner with SIPA for sales to all EGE's within Colorado.</p>
<p>Acceptance of SIPA MSA General agreement to the SIPA MSA with limited changes or exceptions.</p>

C. Negotiations

At the conclusion of the evaluation, SIPA will determine the number of Offerors with which it will begin contract negotiations. Negotiations will continue until SIPA, in its sole discretion, determines that the best value for SIPA and its customers has been obtained.

D. Award of Contract

SIPA reserves the right to make award(s) that best serve the interest of SIPA and its customers.

Award(s) may be made to the Offeror(s) providing the best value to SIPA and its customers. Any award for this RFP will be posted on the SIPA website upon execution of a Contract.

The issuance of this RFP does not imply that SIPA is making an offer to do business with any RFP Offeror. No agreement or other binding obligation on SIPA is implied or will occur unless and until a definitive agreement is executed. The issuance of this RFP and the submission of an Offeror's proposal does not create any obligation upon SIPA to purchase electronic information, products, and services from an Offeror, or to enter into any binding legal relationship with one (1) or more of the Offerors.