**Colorado Statewide**

**Internet Portal Authority**

**Request for Proposal (RFP)**

**Solicitation No. 23-001**

**Salesforce Implementation**

**and Integration Services**

**RFP Attachment 1**

**Offeror Information**

Logo

Description automatically generated

**Table of Contents**

[**1.**](#_heading=h.30j0zll) **Offeror Identity Form ……………………………………………………… 3**

[**2.**](#_heading=h.1fob9te) **Executive Summary ………………………………………………………… 4**

[**3.**](#_heading=h.3znysh7) **Offeror Eligibility and Response Integrity Requirements …….. 5**

[**A.**](#_heading=h.2et92p0) **Offeror Eligibility Criteria …………………………………………….. 5**

[**B.**](#_heading=h.tyjcwt) **Response Integrity Requirements ………………………………… 7**

[**4. Statement of Work …………………………………………………………. 8**](#_heading=h.3dy6vkm)

[**A.**](#_heading=h.1t3h5sf) **Salesforce Implementation and Integration Services ……… 8**

[**B. Account Management …………………………………………………. 8**](#_heading=h.2s8eyo1)

[**5. Offeror Experience …………………………………………………………. 9**](#_heading=h.17dp8vu)

[**6. Past Performance …………………………………………………………… 10**](#_heading=h.3rdcrjn)

[**7. Offeror Pricing Worksheet ………………………………………………. 12**](#_heading=h.26in1rg)

1. **Offeror Identity Form**

This form must be filled out in its entirety and signed by an officer or agent empowered to contractually bind the Offeror. **This document should be submitted as a separate PDF.**

|  |  |
| --- | --- |
| **Company Name** |  |
| **Website URL** |  |
| **Federal Employer Identification Number (EIN)** |  |
| **Principal Place of Business**  **Address:**  **City, State, Zip:** |  |
| **Location of Team Serving this Agreement (if different)**  **Address:**  **City, State, Zip:** |  |
| **Point of Contact re: Offeror’s RFP Response**  **Name:**  **Title:**  **Address:**  **City, State, Zip:**  **Phone Number:**  **Email:** |  |
| **Point of Contact for Contract Negotiations**  **Name:**  **Title:**  **Address:**  **City, State, Zip:**  **Phone Number:**  **Email:** |  |

Please list the names, contact information, and positions of any additional persons granted authority to contractually bind Offeror if Offeror is selected for further negotiations with SIPA:

By signature hereon, Offeror certifies that all statements and information prepared and submitted in the response to this RFP are current, complete, and accurate.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Officer or Agent empowered to contractually bind the Offeror

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date

1. **Executive Summary**

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.

1. **Minimum Offeror Eligibility and Response Integrity Requirements**

In five (5) pages or less, Offeror must clearly state how it meets each of the requirements described below. In addition to completing the tables included in each minimum requirement section below, Offerors are permitted to include narrative statements which further indicate how Offeror meets each requirement, within the page limit allowed.

| 1. **Offeror Eligibility Criteria** | **Offeror Response** |
| --- | --- |
| The Offeror must be a legal entity in good standing and authorized to do business in Colorado ([link](https://www.sos.state.co.us/biz/BusinessEntityCriteriaExt.do?quitButtonFlg=Y)). If an Offeror is owned or controlled by a parent company, the response must also identify the name and main office address of that parent company. |  |
| Offeror certifies that it does not have any potential or actual conflict of interest in connection with a response to this RFP. A conflict of interest may include, but is not limited to, access to any non-public information by the Offeror regarding the RFP or its subject matter, or by any of the Offeror’s employees, contractors, or agents, including any individual who may have had access to non-public information in a prior capacity before entering into a relationship with the Offeror.  The Offeror acknowledges that even the appearance of a conflict of interest may be harmful to SIPA’s interests. The Offeror shall disclose in its response whether there currently is, or potentially could be, the appearance of a conflict of interest regarding this RFP, its response, its staff, any proposed subcontractors or partners, and any related business with SIPA. |  |
| Offeror certifies that the responding entity and its principals are eligible to participate in this transaction and have not been subject to suspension, debarment, or similar ineligibility determined by any federal, state, or local governmental entity.  Offeror must disclose in its response, to the best of its knowledge and belief, whether it, its principals, or any proposed subcontractors:  i. Are presently debarred, suspended, proposed for disbarment, or declared ineligible;  ii. Have any convictions or civil judgments rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;  iii. Are presently under investigation for, indicted for, or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in the previous bulleted item; and  iv. Have within three (3) years preceding this application had one or more public transaction (Federal, State, or local) terminated for cause or default. |  |
| Completed W-9 (please attach) |  |
| Certificate of Insurance (please attach) that sets forth limits of liability to include all insurance coverage of the company.  If awarded a Contract, the Offeror shall provide a certificate of insurance for the coverages and in the minimums described in the **MSA.** |  |

| 1. **Response Integrity Requirements** | **Offeror Response** |
| --- | --- |
| **False Statements**  Offeror represents and warrants that all statements and information in its submitted response are current, complete, true, and accurate. Submitting a response to the solicitation with a false statement or making material misrepresentations during the performance of a contract is a material breach of contract and may void the submitted response and any resulting contract. |  |
| **Deceptive Trade Practices; Unfair Business Practices**  Offeror represents and warrants that it has not been the subject of allegations of deceptive trade practices violations or the subject of allegations of any unfair business practice in any administrative hearing or court suit, and that Offeror has not been found to be liable for such practices in such proceedings. Offeror certifies that it has no officers who have served as officers of other entities who have been the subject of allegations of deceptive trade practices violations or the subject of allegations of any unfair business practices in an administrative hearing or court suit and such officers have not been found to be liable for such practices in such proceedings. |  |
| **Collusion**  Offeror has not colluded with, nor received any assistance from, any person who was paid by SIPA to prepare specifications or a solicitation on which an Offeror’s bid is based and will not allow any person who prepared the respective specifications or solicitation to participate financially in any contract awarded. |  |

**4. Response to Statement of Work**

In no more than eight (8) pages, Offeror shall describe their scope of services and account management strategy. Please include any additional capabilities, services, or solutions that should be considered by SIPA as part of an award.

1. **Salesforce Implementation and Integration Services**

At a minimum, please address:

* Expertise in designing, integrating, implementing, and providing technical improvements to new or existing Salesforce solutions
* Experience developing Salesforce solutions that are PCI, CJIS, FERPA, or HIPAA compliant
* Experience implementing and integrating Salesforce third-party applications
* Capability to provide required solution-specific components of implementations and integrations

**B. Account Management**

At a minimum, please address:

* Customer Service
* Account Management Team
* Administrative Workflows
* SIPA-Supplier Relationship

**5. Offeror Experience**

**Offeror must demonstrate at least three (3) years of experience providing Salesforce Implementation and Integration Services, as described in the Statement of Work, to government entities.**

In no more than four (4) pages, Offeror shall summarize its business experience providing Salesforce Implementation and Integration Services to governmental entities.

Offeror shall duplicate the table below as necessary to provide all relevant experience within the page limit and include engagements that reflect the three (3) years of experience requirement in working with government entities.

Offeror shall use projects reflecting the government markets in which it typically works. Offeror shall describe and/or demonstrate how the experience supports Offeror qualifications described in this RFP.

Offeror may use the comments column to indicate if a listed element/role was not within scope of the project.

|  |  |  |
| --- | --- | --- |
| **Business Experience**  **(Describe in detail for each element):** | **Description** | **Comment** |
| 1. **Project Information.**   Offeror shall provide:   1. Client Name 2. Project Name 3. Project Period (dates) |  |  |
| 1. **Project Scope**   Offeror shall describe the scope of the Salesforce Implementation and Integrations Services provided for a government entity. Services for Colorado governmententities are preferred, but not required. |  |  |

**Offeror shall not refer to information elsewhere in the RFP Proposal or reference website links.** Attachments are acceptable and should be clearly marked and referenced.

**6. Past Performance**

Offeror shall provide contact information and a brief description of services provided for three (3) references, who SIPA may contact, for which the Offeror provided Salesforce Implementation and Integration Services.

**Offeror Name:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Reference No. 1**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Client Organization:** |  | | |
|  | | | |
| **Contact Person Name** |  | | |
| **Contact Person Title** |  | | |
| **Phone Number** |  | **Email** |  |
|  | | | |
| **Project Title** |  | | |
| **Brief Description of Services** |  | | |
| **Project Period (dates)** |  | | |

**Reference No. 2**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Client Organization:** |  | | |
|  | | | |
| **Contact Person Name** |  | | |
| **Contact Person Title** |  | | |
| **Phone Number** |  | **Email** |  |
|  | | | |
| **Project Title** |  | | |
| **Brief Description of Services** |  | | |
| **Project Period (dates)** |  | | |

**Reference No. 3**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name of Client Organization:** |  | | |
|  | | | |
| **Contact Person Name** |  | | |
| **Contact Person Title** |  | | |
| **Phone Number** |  | **Email** |  |
|  | | | |
| **Project Title** |  | | |
| **Brief Description of Services** |  | | |
| **Project Period (dates)** |  | | |

**7. Offeror Pricing Worksheet**

Offeror shall provide:

1. Offerors are required to provide an hourly rate (EGE Customer Pricing) for the following positions as relates to Salesforce Implementation and Integration services:

|  |  |
| --- | --- |
| **Position** | **EGE Customer Pricing (Hourly Rate)** |
| Engagement Owner | $ |
| Solution Owner (Project Manager) | $ |
| Solution Architect | $ |
| Developer | $ |
| Platform Specialist | $ |
| Technical Architect | $ |
| Business Analyst | $ |

1. Offerors are required to provide a **Standard SIPA Discount** percentage off of EGE Customer pricing.

|  |  |
| --- | --- |
| **Description** | **Amount** |
| Standard SIPA Discount *(required)* | % |