



**VIRGINIA DEPARTMENT OF  
SOCIAL SERVICES**

**COMMONWEALTH OF VIRGINIA  
DEPARTMENT OF SOCIAL SERVICES  
801 East Main Street  
Richmond, VA 23219**

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1, or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, sexual orientation, gender identity, political affiliation, or status as a service disabled veteran or any other basis prohibited by state law relating to discrimination in employment. VDSS is committed to increasing procurement opportunities for small and micro businesses, including small or micro businesses that are owned by minorities, women, or disabled veterans, and strengthening the Commonwealth's overall economic growth through the development of its IT suppliers.

**REQUEST FOR PROPOSALS (RFP) #ITS-22-051  
for**

**Project Name:** Salesforce System Integrator

**Issue Date:** May 2, 2023    **Due Date/Time:** June 29, 2023 2:00pm Eastern

**Single Point of Contact (“SPOC”):** Whitney Wallace

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**Sourcing Scope:** Virginia Department of Social Services

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# 1. INTRODUCTION

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## A. RFP Objective and Project Overview

The Virginia Department of Social Services (“VDSS”) has issued this Request for Proposals (“RFP”), Salesforce Integrator #ITS-22-051, to establish multiple contracts with Salesforce certified partnering consultants to carry out the process of migrating and configuring VDSS health and human services systems into the Salesforce Low Code Application Platform (“LCAP”) provided by the Virginia Information Technology Agency (“VITA”) and licensed by VDSS. This work will be performed in accordance with the requirements detailed in each awarded Statement of Work (SOW). See section 1.D for details on the SOW process. All Salesforce System Integrator (SI) partners must meet certain Salesforce requirements to maintain their status as a certified Salesforce Partner. This includes metrics such as certified individuals on staff and customer satisfaction scores.

The four main levels of integration include data, process, user interface, and security integration that will be used to assist VDSS with Design, Development (configuration), Implementation (“DDI”) and integration activities. These activities may also include optional operations and maintenance (O&M Services) to include a help desk and incident management.

SI must also supply and have experience applying Salesforce accelerators that, when implemented, will deliver desired business outcomes more effectively and efficiently than creating similar functionality on the LCAP without accelerators. Examples of accelerators are shown in the Table below.

### *Examples of Salesforce Accelerators*

Accelerator	Implementation	Business Outcomes
Service Cloud Case Actions Configuration	Automate key service processes to reduce service response time and increase rep efficiency	Increase productivity and reduce costs
Service Cloud Case Assignment Design	Review current case workflow and optimize configuration	Increase customer satisfaction and minimize operating costs
Service Cloud Case Escalation Management	Leverage the Service Cloud to automate case escalation and more proactively engage with customers	Increase customer satisfaction and grow your business faster
Service Cloud Console Design	A customized Service Cloud console interface that enables agents to quickly access data and case resolution tools	Increase agent efficiency and productivity
Service Cloud Macro Design	Recommendations for implementing and technical advice to configure macros	Improve case resolution time and agent productivity
Business Process Automation Assessment	Learn best practices for automating processes and mapping them to your business requirements	Reduce costs, improve employee efficiency, and increase process effectiveness
Configure Process Automation Using Salesforce Platform	Automate key business processes to decrease time spent on manual tasks that are primarily driven by logic chains	Reduce costs and increase employee efficiency
Salesforce Data Quality Management	Streamline your data quality management system	Gain business insights
Salesforce1 Mobile User Experience Design	Strengthen your team's performance by elevating your employees' mobile user experience, optimizing business processes for mobile engagement	Improve employee satisfaction and productivity while increasing ROI

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For the purposes of this RFP, “**Supplier**” (or “**Bidder**” or “**Offeror**” or “**Respondent**”) means any entity that submits a proposal in response to this RFP.

Timely proposals received in response to this RFP will be evaluated by an evaluation team to select and allow VDSS to contract with a pool of Salesforce certified partnering consultants. The aim is for an SI pool to be contractually established through this RFP, ideally, via contract awards to more than one vendor. VDSS will then plan to issue system integration work to those contracted vendors through separate Statements of Work (SOWs). Those SOWs may allocate certain portions of the work activities to more than one contracted Supplier. Alternatively, VDSS may issue several SOWs for all of the work to be performed, as a result of the RFP, to one contracted Supplier. Although it is VDSS’s intent to accomplish substantial improvements and cost efficiencies as the result of this project, and to establish a pool of qualified Salesforce Integrator Pool providers, VDSS may determine that no change is warranted at this time. Thus, as a result of this RFP, VDSS may, at its sole discretion, make one award, multiple awards, or none at all.

VDSS’s expectation is that this effort will result in the establishment of contracts that will provide the means to satisfy the majority of VDSS’s immediate and future Salesforce Low Code Application Platform DDI, integration, and Accelerator needs.

Section 5 sets forth the detailed requirements. VDSS reserves the right to adjust the requirements or scope of this RFP. In the event that any modifications become necessary, an amendment to this RFP will be posted on the Commonwealth’s procurement portal, eVA, located at: <http://www.eva.virginia.gov>.

## **B. Innovation to Government**

The Commonwealth encourages all Suppliers to bring innovative ideas and/or solutions to government—ideas that result in cost and operational efficiencies or improvements while enhancing the services that governments provide its citizens.

## **C. VDSS Overview**

The Virginia Department of Social Services is one of the largest agencies in the Commonwealth of Virginia (COV or Commonwealth) and is designated with supervising the State’s social services programs in accordance with the Code of Virginia. In this role, VDSS’ goal is to promote the well-being of the citizens of Virginia through the delivery of essential services and benefits to ensure families are strengthened, and individuals achieve their highest level of self-sufficiency.

VDSS’ mission is: To design and deliver high-quality human services that help Virginians achieve safety, independence, and overall well-being.

VDSS’ vision is: A Commonwealth in which all Virginians have the resources and services they need to shape strong futures for themselves, their families, and their communities.

## **D. Statements of Work**

VDSS may or may not grant future SOWs. SOWs will not be issued unless funding has been identified and is available for the work to be done. Statement of Needs (SON) will be sent out by VDSS for a response from those contracted Suppliers who are qualified to provide the services. Suppliers will respond by submitting SOWs in a similar format as the SOW Template that is attached as Exhibit C to the Appendix F VDSS Information Technology Service Contract to VDSS within the time period stated in the SON.

Each SOW must include a defined scope with deliverables, defined performance criteria, schedule, and budget. A purchase order will be assigned/issued for each SOW.

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The estimated level of effort for each project SOW will be determined as the Supplier develops a detailed plan in response to the SON. VDSS will complete a review of each Supplier's project SOW focusing the review in the following areas: project design, project methodology, project schedule, and the cost proposal detailing the cost breakdown. VDSS will determine from this review which project SOW best meets the SON and is within budget. The SOW must be accepted by VDSS before the Supplier can perform any work on a given task.

The Supplier's project SOW must include the items listed above and:

- a. A dollar cap for performing the work
- b. All expenses as defined in this contract and applicable SON
- c. The negotiated hourly rates not to exceed the maximum price found on the rate card included in the Supplier's contract
- d. Payment procedures in accordance with Section 10 Fees, Ordering, and Payment Procedure in the Contract
- e. Contact person for the project SOW
- f. Stakeholders
- g. Current Platform/Architecture
- h. Current workflow
- i. Current processes
- j. Current specifications used
- k. Identification of desired reengineering components of current solution

The Supplier shall review the SON and return the project SOW utilizing the SOW Template, Exhibit C to the Contract. VDSS will issue written acceptance to proceed with the project SOW to the successful Supplier. The Supplier is fully expected to complete the services detailed in the SOW within the agreed upon budget and schedule. The Supplier will not be compensated for work performed outside the approved project schedule.

VDSS anticipates issuing multiple SOWs to the successful contractors from this RFP. Subsequent SOWs will provide details for each application's technical environment and protocols.

To qualify for Large Projects (defined as budget > \$10M, high complexity, multiple interfaces/integrations, timeframe > 15 months) the Salesforce partnering consultant must have attained a Summit Level designation.

To qualify for Medium Projects (defined as budget \$5.1M to 10M, 10-14 months) and Small Projects (defined as budget \$5M, < 9 months) the Salesforce partnering consultant must have attained Crest, Ridge, or Summit Level designation.

VDSS reserves the right to name a supplier for projects that are a continuation of work previously performed by that supplier, including but not limited to, enhancements, maintenance, and upgrades.

#### **E. Third Party Vendors**

Third party vendors that are hired by VDSS and that SI partners may work with if awarded a contract under this RFP and a subsequent project SOW are, but shall not be limited to, the following: Independent Validation and Verification (IV&V) vendors who shall provide project oversight required by Federal partners and VITA, project management/quality assurance/organizational change management vendor(s), human centered design vendor(s), and integration design vendor(s) to support VDSS during the applicable project.

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## **2. PROPOSAL ADMINISTRATION AND INSTRUCTIONS**

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### **A. Overview**

This RFP was developed to provide all potential Suppliers with the information required to prepare proposals. This section outlines the administrative procedures and guidelines you must use and comply with when preparing a proposal. Nothing in this RFP constitutes an offer or an invitation to contract.

### **B. Virginia Public Procurement Act (VPPA)**

This RFP is governed by the Virginia Public Procurement Act (“**VPPA**”), Code § 2.2-4300 *et seq.*, and other applicable laws.

### **C. Anti-Discrimination- § 2.2-4310 and § 2.2-4311, and § 2.2-4343.11**

By submitting its proposal, a Supplier certifies to the Commonwealth that it will conform to the provisions of the Federal Civil Rights Act of 1964, as amended as well as the Virginia Fair Employment Contracting Act of 1975, as amended; and, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and § 2.2-4311 of the VPPA.

### **D. Ethics in Public Contracting - § 2.2-4367 *et seq.***

By submitting its proposal, a Supplier certifies that its proposal is made without collusion or fraud; that the Supplier has not offered or received any kickbacks or inducements from any other bidder, supplier, manufacturer, or subcontractor in connection with its proposal; and that the Supplier has not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services, or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged. In addition, a Supplier will disclose any actual or perceived conflicts of interest in its proposal and will notify VDSS if it becomes aware of a potential conflict of interest in the future.

### **E. Announcement of Award - § 2.2-4300 *et seq.***

If a contract is awarded or announced as a result of this RFP, VDSS will post notice of the award decision on the DGS/DPS eVA web site (<http://www.eva.virginia.gov>) for a minimum of 10 days. No award decision will be provided verbally. Any final contract, including pricing, awarded as a result of this RFP will be made available for public inspection.

### **F. Authorization to Transact Business in the Commonwealth - § 2.2-4311.2**

All Suppliers organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership, or registered as a limited liability partnership must be authorized to transact business as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code, or as otherwise required by law. In its proposal, Supplier must include either (i) Supplier's identification number issued to it by the State Corporation Commission; or (ii) a statement explaining why Supplier is not required to be registered. No award can be made to any Supplier without this information unless this requirement is waived. Appendix D of this solicitation includes a space for Supplier to provide the information required in (i) or (ii) of this subsection. If a Supplier anticipates the use of additional resources through a partnership or subcontracting relationship with other entities, the requirements of this Section 2.F will also apply to any entities that are engaged as partners or subcontractors of Supplier providing services directly to the Commonwealth upon award of a contract.

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## **G. Prohibited Products and Services - § 2.2-5514**

No Supplier may include as part of its proposal, whether directly or indirectly through subcontractors, any hardware, software, or services that have been prohibited for use on federal systems by the U.S. Department of Homeland Security.

## **H. Prohibited Contributions and Gifts - § 2.2-4376.1**

No Supplier that submits a proposal in response to this solicitation, and no individual who is an officer or director of the Supplier shall knowingly provide a contribution, gift, or other item with a value greater than \$50 or make an express or implied promise to make such a contribution or gift to the Governor, his political action committee, or the Secretary of Administration during the period between the submission of the proposal and the award of any resulting contract award with an expected value of \$5 million or more dollars.

## **I. Liability**

The issuance of this RFP and the receipt of information in response to this RFP will not cause VDSS to incur any liability or obligation, financial or otherwise, to any Supplier. VDSS assumes no obligation to reimburse or in any way compensate a Supplier for expenses incurred in connection with its proposal.

## **J. Disclosure**

Except as provided in paragraph "K" below, all proceedings, records, contracts and other public records relating to this procurement shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act (§ 2.2-3700 et seq.)

## **K. Trade Secrets and Proprietary Information**

FAILURE TO COMPLY WITH THE FOLLOWING STATUTORY REQUIREMENTS WILL RESULT IN ALL PROPOSAL MATERIALS BEING SUBJECT TO RELEASE TO OTHER OFFERORS AND THE PUBLIC IN ACCORDANCE WITH THE VPPA AND THE VIRGINIA FREEDOM OF INFORMATION ACT.

Pursuant to Code § 2.2-4342(F), trade secrets or proprietary information submitted by a bidder or offeror in connection with a procurement transaction (or, if applicable, a prequalification application submitted pursuant to subsection B of § 2.2-4317) shall not be subject to the Virginia Freedom of Information Act (Code § 2.2- 3700 et seq.) **if** a Supplier:

- i. invokes the protections of this section in writing prior to or upon submission of the data or other materials,
- ii. Identifies specifically the data or other materials to be protected, and
- iii. States the reasons why protection is necessary.
- iv. **Please note** that you may not designate as trade secrets or proprietary information (a) an entire bid, proposal, or prequalification application; (b) any portion of a bid, proposal, or prequalification application that does not contain trade secrets or proprietary information; or (c) line item prices or total bid, proposal, or prequalification application prices. The classification of an entire proposal or of pricing as a trade secret or proprietary information is not acceptable and will not be honored by VDSS or the Commonwealth.

You should fill out Appendix N-Proprietary and Confidential Identification and provide it as a separate appendix to your proposal. This should include a list of all pages in the proposal that contain proprietary information and the reason you deem the information proprietary.

Suppliers should keep in mind that procurement and contract records are generally public records open to inspection in accordance with the Virginia Freedom of Information Act (see

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Code § 2.2-4342(A)) and that transparency in procurement, contracting, and other governmental functions serves important public policy objectives. See Code §§ 2.2-4300(C) & 2.2-3700(B). Accordingly, Suppliers should not designate as trade secrets or proprietary information any more of their proposal than is necessary.

By submitting a proposal in response to the RFP, a Supplier grants VDSS a worldwide, royalty-free, non-sublicensable, non-exclusive, irrevocable license to retain, reproduce, and use the proposal (including any exhibits or other documents or materials the proposal incorporates) in any format for governmental purposes required or provided for by Virginia law. The foregoing includes, but is not limited to, the right for VDSS to use information submitted in response to this document in any manner VDSS may deem appropriate in evaluating the fitness of the services or solution(s) proposed.

## **L. Proposal Protocol**

In order to be considered for selection, Suppliers must submit a complete response to this RFP as described herein. Suppliers must submit proposals on the Commonwealth of Virginia's electronic procurement site, [www.eva.virginia.gov](http://www.eva.virginia.gov) ('eVA'), no later than 2:00 PM local time on June 29, 2023.

**ONLY ELECTRONIC RESPONSES SUBMITTED THROUGH eVA WILL BE ACCEPTED. Proposals received via hand-delivery, mail, email, or fax will not be accepted.** Suppliers must be registered in eVA to submit a response to this RFP.

VDSS requires that all Suppliers upload their proposals in accordance with the Section 3. Proposal Format, Table 2 as follows:

1. One (1) complete electronic copy of each file titled as specified in Section 3 of this RFP without pricing.
2. One (1) complete electronic copy of Supplier's rate card ("Rate Card" must be contained in the document title).
3. One (1) complete electronic copy titled "Redacted" as specified in Table 2 of Section 3.A of this RFP, with all redactions, if necessary, consistent with the requirements specified in Section 2.K, "Trade Secrets and Proprietary Information". Please note: This copy is only required in the event redactions are taken, consistent with the requirements of RFP, Section 2, subsection K, Trade Secrets and Proprietary Information.

**The proposal must be provided in Microsoft Word or Excel, as specified.**

The maximum file size per attachment is 60 MB, however; there is no limit on the number of files you may attach. If the size of the file is greater than 60 MB, the file should be broken down into smaller files and labeled in a sequential order (Ex: Part 1, Part 2 or Tab 1, Tab 2).

It is the responsibility of the Supplier to ensure their proposal and all required documentation is properly completed, readable, and uploaded to eVA by the date and time noted in Section 2.Q. Suppliers should allow sufficient time to account for any technical difficulties they may encounter during online submission or uploading of the documents. Any proposals received after the deadline will not be considered. Suppliers shall make no other distribution of their proposals. In the event of any technical difficulties, Suppliers must contact the eVA Customer Care Center at 1-866-289-7367 or via email at [eVACustomerCare@DGS.virginia.gov](mailto:eVACustomerCare@DGS.virginia.gov).

The proposal must be signed by an authorized representative of the Supplier.

Proposals should be prepared and organized as indicated in Section 3, "Proposal Format", providing a concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

You should be prepared to incorporate all statements made in your proposal in response to Sections 5, 6, and 7 into the final contract in the event that you are awarded the contract.

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Submitted proposals shall remain valid until a contract award has been made.

#### **M. Single Point of Contact**

Submit all inquiries concerning this RFP in writing by email, subject: "Questions on RFP # ITS-22-051 to:

SPOC: Whitney Wallace

Email: whitney.wallace@dss.virginia.gov

VDSS cannot guarantee a response to questions received less than five (5) days prior to the proposal due date. No questions will be addressed orally.

To ensure timely and adequate consideration of proposals, **Suppliers are to limit all contact**, whether verbal or written, pertaining to this RFP to the designated SPOC for the duration of this proposal process.

#### **N. Pre-Proposal Teleconference**

There will be an optional pre-proposal teleconference held on the date specified in Table 1 of Section 2.R. The pre-proposal conference is open to all interested Suppliers, and you are encouraged to attend. There will be no opportunity for a private or individual tour or presentation. Suppliers are encouraged to submit pre-proposal questions in writing at least 72 hours prior to the pre-proposal teleconference. These questions may be answered as part of the pre-proposal conference.

To participate in the pre-proposal teleconference, register with Whitney Wallace at whitney.wallace@dss.virginia.gov by sending an email stating your firm's name and your participating representative(s) by the registration deadline in Table 1 of Section 2.R below. You will receive a teleconference number for the call.

#### **O. Evaluation Process**

VDSS will review each proposal received by the due date and time to determine whether it meets the Must Have factors of this RFP. All Must Have factors are evaluated on a met-or-not-met basis. Any proposal that does not meet all of the Must Have factors will be set aside and receive no further consideration.

The proposals that meet all the Must Have criteria will be distributed to the evaluation team who will assess and score each Supplier's response to Sections 5-7, 9 and Appendix E of this RFP based on a review of the submitted materials.

VDSS may elect to continue the evaluation of the most qualified proposal (s) and may request that Suppliers clarify or explain certain aspects of their proposals.

A numerical scoring system will be used in evaluation of proposals. The point values assigned to each of the evaluation criteria shall be posted in eVA prior to the due date and time for receiving proposals.

At any point in the evaluation process VDSS may employ any or all of the following means of evaluation:

- Supplier partner status as listed in the SalesForce AppExchange (<https://appexchange.salesforce.com/consulting>)
- Reviewing industry research
- Supplier presentations
- Site visits

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- Supplier's status as a small business or micro business, including small or micro businesses that are owned by minorities, women, or disabled veterans, and certified by the Department of Small Business and Supplier Diversity ("DSBSD")
- Supplier's planned amount of spend with certified SwaM or micro business (as defined in Section 7 below) subcontractors, and Non-SwaM businesses.
- Supplier's employment of persons with disabilities to perform the specifications of the contract.
- Contacting Supplier's references
- Review of Supplier's ability and willingness to comply with the commonwealth's security and data privacy policies, standards, guidelines and related contract terms as specified in the RFP
- Product demonstrations/pilot tests/detailed demonstrations
- Contacting Supplier's customers
- Interviewing key personnel
- Requesting Suppliers elaborate on or clarify specific portions of their proposal, including, as applicable, any responses to the RFP's security requirements

VDSS may limit all of the above to the most qualified proposals. No Supplier is guaranteed an opportunity to explain, supplement or amend its initial proposal. Each Supplier is encouraged to ensure that its initial proposal contains and represents its best offering. **You should submit your best proposal and not assume there will be an opportunity to negotiate, amend or clarify any aspect of your initial submitted proposal.**

Each Supplier should be prepared to conduct product demonstrations, pilot tests, presentations or site visits at the time, date, and location of VDSS's choice, should VDSS so request.

VDSS will select for negotiation those proposals deemed to be fully qualified and best suited based on the factors as stated in the RFP. Negotiations will be conducted with these Suppliers. After negotiations, VDSS may select the proposal(s) that, in its opinion, is the best proposal(s) representing best value and may award a contract to that Supplier(s).

If any Supplier fails to provide the necessary information for negotiations in a timely manner, or fails to negotiate in good faith, VDSS may terminate negotiations with that Supplier at any time.

VDSS reserves the right, at its sole discretion, to reject any proposal or cancel and re-issue the RFP. In addition, VDSS reserves the right to accept or reject in whole or in part any proposal submitted, and to waive minor technicalities when in the best interest of the Commonwealth.

**VDSS SHALL NOT BE CONTRACTUALLY BOUND TO ANY SUPPLIER PRIOR TO THE EXECUTION OF A DEFINITIVE WRITTEN CONTRACT.**

## **P. Evaluation Factors**

The evaluation factors involved in this RFP are as follows:

- Must Have (M) factors identified in the table below:

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	Must Have (M) Factors
	(M) Proposals must be received by the due date and time. No late proposals will be reviewed.
	(M) Supplier must be a Salesforce certified consulting partner. The current Salesforce certification tiers are described in the following link: <a href="https://go.salesforce-partners.com/consultingpartner">https://go.salesforce-partners.com/consultingpartner</a> Supplier must provide evidence of certification to include a reference in the SalesForce AppExchange.
	(M) For all Statements of Work, all assigned Developers must be a Salesforce certified Platform Developer I at a minimum. Salesforce roles and certifications are described at the following link: <a href="https://trailhead.salesforce.com/en/credentials/developeroverview/">https://trailhead.salesforce.com/en/credentials/developeroverview/</a>
	(M) For all Statements of Work, the ratio of Salesforce Platform Developer I to Salesforce Platform Developer II's assigned to a project must be 4:1. This is a material requirement of the Contract and for each SOW issued under the Contract.

ii. The extent to which the Supplier's proposal satisfies the requirements identified in Sections 5, 9 and Appendix E.

iii. Supplier's viability and past performance (see Section 6 Supplier Profile), this will include Supplier's diligence and thoroughness in following and completing the requirements of this solicitation.

iv. Supplier's status as a DSBSD-certified small business or micro business, including small businesses or micro businesses that are owned by minorities or women, and Supplier's proposed Supplier Procurement and Subcontracting Plan (see Section 7).

v. Submitted rate cards, negotiated rates, discounts, etc. (see Section 8).

#### **Q. eVA Procurement Website and Registration**

The Commonwealth's procurement portal, eVA, located at <http://www.eva.virginia.gov>, provides information about Commonwealth solicitations and awards. Suppliers must be registered in eVA in order to submit a proposal to this RFP. To register with eVA, select the "Register Now" option from the left hand menu on the eVA homepage, <http://www.eva.virginia.gov>, for registration instructions and assistance, as well as instructions on how to submit proposals and accept orders.

Suppliers are encouraged to check this site on a regular basis and, in particular, prior to submission of proposals to identify any amendments to the RFP that may have been issued.

#### **R. Timetable**

Table 1

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Activity	Target Completion Date
RFP posted to eVA	<b>May 2, 2023</b>
Register for pre-proposal teleconference due to VDSS	<b>May 24, 2023</b>
Supplier pre-proposal teleconference	<b>May 30, 2023</b>
Deadline for all questions	<b>May 31, 2023</b>
Proposals due	<b>June 29, 2023</b>
Presentations and site visits (should VDSS elect)	<b>TBD</b>
Contract(s) awarded	<b>TBD</b>

The timetable above is provided for planning purposes only and subject to change at VDSS' discretion.

#### **S. Excluded Parties List**

A Supplier will not be awarded a contract if it, or any of its affiliates or subcontractors, is an excluded entity on the federal government's System for Award Management ("SAM") at <https://www.sam.gov/SAM/>, or the Commonwealth's Debarment List as provided by Code § 2.2-4321 at the time of award.

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### **3. PROPOSAL FORMAT**

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All Suppliers must adhere to the specific format set forth in Table 2 below in order to aid the evaluation team in its efforts to evaluate all proposals fairly and equitably. Proposals that deviate from the requested format will require additional time for review and evaluation. VDSS may reject any proposal that is not in the required format or does not address all the requirements of this RFP.

Proposals should be written specifically to answer this RFP. General “sales” material should not be used within the body of the proposal and any additional terms or conditions on the “sales” material will be considered invalid. If desired, you may attach its “sales” material in a separate appendix to your response.

It is essential that your proposal be thorough and concise. You should avoid broad, unenforceable, or immeasurable responses and should include all requested information in each section as indicated below.

In order to facilitate VDSS's review of the submitted proposals, you must provide the requested information in the following format: YOU MUST PLACE YOUR COMPANY'S LEGAL NAME, not “VDSS” and FILE TITLE IN EACH FILE NAME (e.g., ABC Corp Solicitation Name “Salesforce Integrator Supplier Pool” Transmittal.doc).

#### **A. Supplier's Proposal Format**

The Supplier's response should adhere to the following:

1. Use Arial 10-point font for the narrative response, unless it is an inserted picture or diagram.
2. For numbered requirements that also need a narrative response, provide clear and concise responses.
3. If a requirement requests an example and the file is too large to insert within the response, attach the file and clearly indicate the requirement it belongs to and the file name of the example. Only include relevant sample materials, and the minimum needed to represent your capabilities (i.e., you may truncate samples).

The maximum file size per attachment is 60 MB, however; there is no limit on the number of files you may attach. If the size of the file is greater than 60 MB, the file should be broken down into smaller files and labeled in a sequential order (Ex: Part 1, Part 2 or Tab 1, Tab 2)

Table 2

File Title	Contents/Deliverables (Each a separate file)
Transmittal	A signed cover letter, identifying the individuals authorized to negotiate on behalf of the Supplier and their contact information.
Executive Summary	Top level summary of the most important aspects of the proposal, containing a concise description of the proposed solution(s). Requested limitation: 2 pages.

File Title	Contents/Deliverables (Each a separate file)
Detailed Description of Proposed Solution(s)	Supplier's response by item <b>in the table</b> set forth in Section 5, including Appendix E, clearly identifying and detailing the proposed Solution, services, and any processes, methodologies, and resources required by the Solution type and supporting services defined in Section 5 and Appendix E. Requested limitation: 25 pages.
Supplier Profile	Pursuant to Section 6.
Supplier Procurement and Subcontracting Plan	Pursuant to Section 7 and <u>Appendix B</u> .
Appendix A – SLAs, Appendix F – Contract, and Appendix G Supplier Exceptions to Contract Template	Any comments or edits regarding VDSS's proposed contractual terms and conditions pursuant to Section 9 and Appendix F, provided and submitted in redline format in the contract document along with the completed table from <u>Appendix G</u> setting forth your reasons for the requested changes to each clause individually. Supplier should include <u>Appendix A</u> – Service Level Agreement(s) ("SLA"). This should include exceptions or recommended language revisions to any liability provisions. If Supplier is selected to go forward into negotiations and takes exception to any liability language, Supplier shall state any exceptions to any liability provisions contained in the Request for Proposal and the contractual terms in writing at the beginning of such negotiations, submitted via email to the designated VDSS Single Point of Contact (SPOC). Such Supplier provided exceptions or recommended language revisions shall be considered during negotiations.
Appendices	Supplier should include any required appendices including Appendix D, the completed State Corporation Commission form. Provide the implementation plan as requested in Section 5. Any optional information Supplier may wish to submit, not including pricing data.
Pricing	Rate tables as specified in Section 8 and Appendix C. Do not include any pricing data in any other section of your proposal.
Redaction	Redacted proposal.

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By submitting a proposal, you certify that all information provided in response to this RFP is true and accurate.

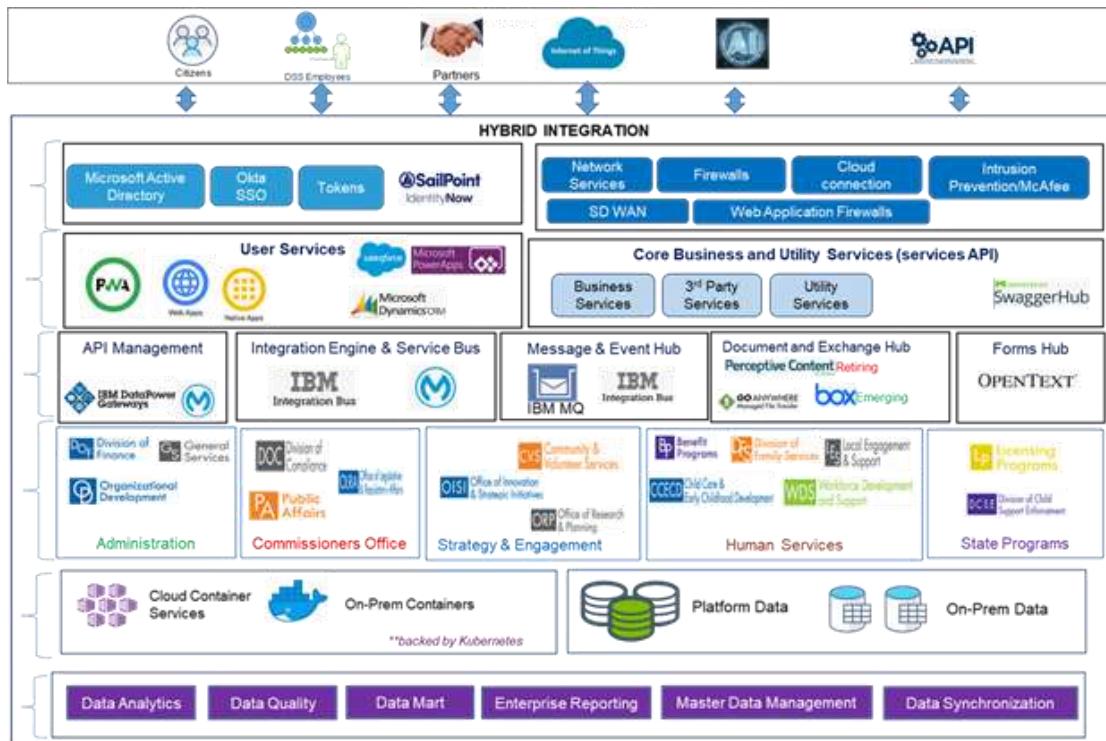
## 4. PRESENT SITUATION

This section presents background information on the potential users of Services. It is not intended to set forth requirements.

### A. Background Introduction

VDSS has developed an enterprise-wide strategic framework to help focus the Agency's collective attention and resources toward strategies that best help achieve the VDSS' mission "–to design and deliver high-quality human services that help Virginians achieve safety, independence and overall well-being." A key objective of the framework is to "–increase and integrate automated technology solutions focused on efficient and targeted service delivery." One of the strategies to achieve this objective is to transition legacy systems by deploying a business process re-engineering plan and implementing a strategic architecture that leverages low code, no code platform technology for enterprise development.

VDSS has selected the Salesforce Lightning Low Code Application Platform (LCAP) as a Service for its next generation architecture. This "on-demand" environment for development, without having to set up and manage the underlying infrastructure, will allow staff to focus on the deployment and management of applications. It is the intent of VDSS to migrate existing applications to the Salesforce Lightning LCAP and to use the LCAP to develop new applications as needed. The To-Be -Architecture for VDSS is shown in the figure below.



VDSS is seeking assistance with Design, Development (configuration), Implementation (DDI) and integration activities for its migration and application development efforts on the Salesforce Lightning LCAP. Having one or more contracts in place with Salesforce SIs that can offer the capabilities and services needed for DDI will allow VDSS to meet their various needs without delays for contracting or security vetting, and to use Commonwealth resources more efficiently than the current ad hoc arrangements.

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The purpose of this RFP is to establish a pool of pre-qualified Salesforce certified partnering consultants that can assist VDSS with DDI and integration tasks on the Salesforce LCAP for a range of applications. While it is the intent of VDSS to move its entire application portfolio to the LCAP, two examples of applications that will move to the LCAP are:

- **Eligibility and Enrollment** – Virginia Case Management System (VaCMS) is the Commonwealth's eligibility and enrollment and case management system for health and human services programs.
- **Child Welfare** – the Commonwealth is committed to replacing its legacy child welfare applications, primarily known as the **Online Automated Services Information System (OASIS)** with a Comprehensive Child Welfare Information System (CCWIS).

### **1. Governing Viewpoint of the Current Solution/Situation**

In order to align with the VDSS's strategic framework, to comply with state and federal requirements, and to ensure no disruption to citizen services, VDSS intends to migrate its legacy systems to a modern, supportable technology platform.

### **2. Suitability of the Current Solution/Situation**

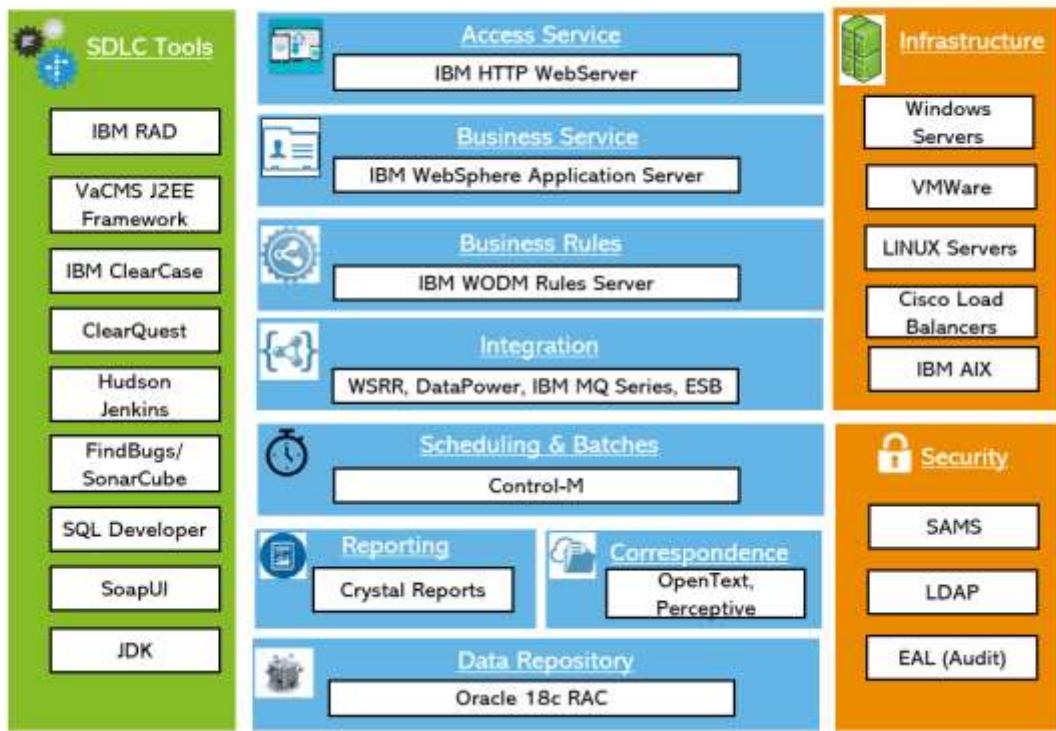
The current VDSS business application solutions in their present forms do not align with the strategic information technology and direction for supporting the business programs of VDSS.

The legacy technologies on which the systems are built are outdated and "siloed," vertically integrated to support delivery of a defined and narrow range of services and not well-integrated with other processes and systems that deliver related services to the same community. From the perspective of the whole environment, the current system for human services programs is characterized by redundant data entry and limited automation for complex categories of programs.

## **B. Current Platform/Architecture**

The figure below shows the current VaCMS Technical Architecture.

# VaCMS Technical Architecture



### 3. Conceptual Framework Diagram of the Current Solution/Situation

Conceptual frameworks for current solutions will vary by application. Framework diagrams will be provided for individual systems with the subsequent SOWs that will be issued.

### C. Other Technical Environment and Protocols Information

General technical environment and protocol information is provided below.

Development: In-house developers use laptops to develop code and perform unit testing. They connect to a development database hosted on a separate Linux server.

System Integration Testing (SIT): All modules of an application are compiled and deployed on the SIT environment. Developers use this environment to test if interactions between all the modules within the application and interactions with internal as well as external services are working. This environment is primarily used by the developers to test the application on the Linux servers before handing it over to the business analysts in QAT.

Quality Assurance Testing (QAT): This environment is used by the business analysts to test the functionality of the applications. The business analysts play the role of a tester to execute the test scripts, record results and report any defects to the developers using IBM Rational Jazz Change Control Management. Developers will try to re-produce the problem in Development or SIT, fix the code in Development, deploy to SIT and then to QAT. Regression testing is also done in this environment.

User Acceptance Testing (UAT): An environment for business users to test the application. This environment is similar to production.

Training (Pre-Production): This environment is to provide training to the end users of the system before the system is released to production.

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**Performance:** Performance testing is conducted in this environment. It is used by the Developers and the Application Architects.

**Staging:** This environment is identical to production. The project team usually develops a deployment plan that includes the processes to follow to release an application into production. Necessary artifacts like the Enterprise Application Resource (EAR) file, Data Manipulation Language (DML) scripts, Data Definition Language (DDL) scripts, etc. will be provided by the project team. All participants identified in the deployment plan will first run the deployment scripts in the staging environment to make sure the scripts run without any errors and the entire deployment process in the staging environment succeeds. If any errors are encountered, then they are reported to the project team. If any revisions are necessary to the deployment processes or new deployment artifacts are required, then the project team provides them to the participants.

**Production:** An environment where authorized end users of the system login to perform their duties.

**Training (Post-Production):** End user training on the system that is currently running in production is provided in this environment. This is different from Training (Pre-Production) environment where training is provided on the system changes or new enhancements that are yet to be deployed.

#### **D. Concerns/issues of Current Solution/Situation**

Concerns for existing systems include support contracts that have reached end of life.

Other systems have a limited number of staff with legacy technology skills; the legacy applications have become difficult to support, and expensive to maintain, enhance, and expand. Many systems do not have the capability to perform automatic updates and require staff intervention to distribute updates. The existing costs of maintenance significantly outweigh the estimated cost of replacement.

Although the legacy applications may provide a basic foundation for automation for business processes, the applications often require duplicate entry of information, support cumbersome data entry processes, and lack major capabilities required to effectively support VDSS programs including the Financial Management, Electronic Document Management, mobile utilization and interoperable functions.

In order to continue to address the key social determinants of health (food security, housing security, health care access, and employment) in an economical and efficient manner, comply with state and federal requirements, and ensure no disruption to citizen services, the goal is to migrate the legacy system to a modern, supportable technology platform.

#### **E. General approach to the projects**

The VDSS enterprise services portfolio includes several enterprise assets that can be shared across applications. These assets are presently hosted on various and disparate infrastructure that does not lend itself to efficient interoperability between the systems and data - associated with the Social Determinants of Health - (SDOH), eligibility and enrollment, and the Medicaid systems.

##### **Migrate enterprise services to the cloud.**

VDSS intends to leverage existing enterprise technical assets as building blocks to achieve modular design objectives. Potential reusable components are listed in the Table below.

##### *Reusable Enterprise Components*

Reusable Components of Enterprise Architecture	
Data Layer Reusable Components	
<b>DMIS</b>	Data Model
<b>Data Warehouse</b>	Data Exchange Methods
Application Layer Reusable Components	
<b>Address Verification</b>	Central Printing
<b>Enterprise Service Bus</b>	Rules Engine
<b>Searching and Merging Management</b>	
Presentation Layer Reusable Components	
<b>Oracle OUD</b>	Portal Architecture

To effectively and efficiently reuse the enterprise technical assets identified in the Table above, VDSS intends to migrate these to a cloud platform (AWS) to ensure stability, scalability, and performance, across the applications that will consume these services.

### **Accelerators**

In addition to the LCAP platform's configurable components, VDSS expects to utilize Salesforce "accelerators," unmanaged packages that allow rapid development of new functionality in the Salesforce ecosystem. VDSS expects the vendor to supply the services necessary to implement accelerators.

### **Configuration & Development**

In addition to the LCAP configurable approach, VDSS expects a small volume of customizations. VDSS expects any customized components, including APEX development, to follow VDSS standards. For any custom coding or configurations, VDSS expects the vendor to follow Salesforce SFDC (software development lifecycle) standards, including CI/CD (continuous development / continuous deployment) standards as documented in **Appendix J - System Integrator Controls** and **Appendix K – Salesforce Code Review Controls & Standards**

### **Project Architecture**

For both the Eligibility and Enrollment migration and the CCWIS DDI projects, VDSS expects to use a Hybrid Agile approach to each system development, which follows the PMI Agile Methodology. The phases include Initiation, Planning, and Execution. The general approach will be iterative development and testing followed by production implementation when all modules have been tested.

**Initiation Phase** – In the Initiation Phase, VDSS will conduct preliminary requirements elicitation and secure approval before developing a high-level design. Next, the team will perform an architectural review and secure approval of the application architecture. A security analysis will be completed and will include a chart of individuals who are Responsible, Accountable, Consulted, and Informed (RACI). Preliminary cost estimates will be obtained for additional support, as needed. Project documentation will be created and routed for review and approval.

**Planning Phase** – In the Planning Phase, Using the documentation created in the Initiation Phase, a request for approval of the project will be developed and submitted to VITA. A security assessment will be conducted, and preliminary requirements from the Initiation Phase will be refined with any additional knowledge gained from the

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assessment and a detailed design will be produced. A Requirements Traceability Matrix (RTM) will be created to track the requirements and how they will be and have been met. The Planning Phase culminates with a project charter and project plan that is packaged with phase documentation of to request approval from the Information Technology Investment Council (ITIC).

VDSS will develop a Statement Of Need for additional resources as needed. Successful respondents to this RFP will be invited to prepare a Statement of Work and provide quotations based off the requirements in the Statement Of Need.

**Execution Phase** – The Execution Phase includes any procurement activities that may be needed to augment in-house resources. Because VDSS follows an agile development methodology with the LCAP, Sprint planning is a prominent feature of this phase. The selected supplier(s) will work with VDSS to plan the execution phase of the projects following the general Hybrid Agile Methodology as described in Appendix H. The sprint process will follow an industry standard approach with sprint phase that include plan, design, develop, test, release, review, and launch.

**Closure Phase** – In the Closure Phase, lessons learned documentation is produced and archived, resources are released and the project is closed out.

**Data Conversion** – Once SOWs are issued, VDSS's expectation is that the Supplier(s) will convert and validate data from legacy systems to the new or newly migrated systems. The Supplier(s) will identify data requiring cleansing for each project to achieve conversion success. It is VDSS's intent to have Supplier(s) complete three mock Conversion runs for each project prior to implementation using the agreed upon mapping and transformation rules. The Supplier(s) should convert all ongoing case, client, and vendor information for each project. In addition, the Supplier(s) will convert seven (7) years of historical data for each project.

**Project Schedule** – For each project, VDSS expects Supplier(s) to provide a Work Breakdown Structure (WBS) within thirty calendar (30) days of execution of the SOW, as well as a preliminary Project Schedule that proposes key phases aligned to the VDSS agile methods, milestones, deliverables, and major tasks for the project. The schedule should also provide the estimated duration of each major task and indicate any dependencies between tasks.

The above Hybrid Agile approach is more fully described in Appendix H – VDSS Delivery Methodology.

## G. VDSS Organizational Structure



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## **5. FUNCTIONAL AND TECHNICAL REQUIREMENTS**

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The objective of this Request for Proposals (RFP) is to establish of a pool of Salesforce certified partnering consultants that are able to carry out the process of integrating Salesforce applications into the Salesforce LCAP provided by VITA and licensed by VDSS. All SI partners must meet certain requirements to maintain their status in the Salesforce ecosystem. This includes metrics such as certified individuals on staff and customer satisfaction scores. The four main levels of integration include data, process, user interface, and security integration that will be used to assist VDSS with Design, Development (configuration), Implementation ("DDI") and integration activities. These activities may also include optional operations and maintenance (O&M Services) to include a help desk and incident management. VDSS anticipates issuing subsequent SOWs for specific applications.

Each Supplier must indicate its capability of fulfilling each specific requirement listed in Appendix E - Requirements. Each Supplier's responses will be reviewed and compared across Suppliers within each service type in order to determine the best solution for the Commonwealth. Supplier should ensure that before submitting its proposal it has provided sufficient and complete responses to reduce the need for additional information.

Must Have, Functional, and Standards Requirements are listed in the Excel spreadsheet titled: [Appendix E – Requirements](#)

Detailed instructions on how to respond to the requirements are provided in the Instructions tab of [Appendix E](#).

**Examples of Projects that will use the pool created by this RFP are included in Appendix L**

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## 6. SUPPLIER PROFILE

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### A. Supplier Proposal Compliance

Before submitting your proposal, you should verify that: (i) your proposal is accurate and complete; (ii) your proposal is prepared in accordance with the solicitation requirements, including providing all information, content, responses and appendices requested and, (iii) all required communication, format and submission instructions are followed.

### B. Supplier Corporate Overview

#### 1. Business

State your firm's core business, background, and experience in the relevant or similar market, and include whether you have had any corrective action plans, written allegations of contract breaches, contract terminations, data leaks, or data breaches within the last three years for any of your contracts (not to exceed 3 pages).

In terms of Supplier experience and reference projects and materials, VDSS defines a "similar" project as having:

- i. Similar experience with federally certified systems (must be government related) such as those described in Appendix L
- ii. Small Projects: budget \$5M, < 9 m, Medium Projects budget \$5.1M to \$10M, 10-14 months; Large Projects: > \$10M, high complexity, multiple interfaces/integrations, > 15 months
- iii. Focus on internal and external customer experience

#### 2. Corporate Identity

Please provide the identity of any parent entity, including address, phone and fax numbers, FEIN or tax ID No., company web site and contact email. Provide the identity of any of your subsidiaries, as applicable (not to exceed 3 pages).

#### 3. Organization and Structure

Please provide an overview of your firm's organizational operating structure and describe the operational and functional relationships of the business units within your organization, as they relate to your proposal and VDSSs' stated needs and requirements. Organizational charts are helpful supplements to the descriptions.

Indicate whether your firm expects to provide the Service with existing resources or plans to secure additional resources by partnering or subcontracting. If applicable, identify the additional resources required to provide the Service included in the proposal and the timetable for obtaining such resources. If your firm expects to utilize a partnership or subcontracting relationship, any such partner or subcontractor shall comply with the requirements of Section 2.F above.

#### 4. Locations

Please describe the geographical locations of your firm at the national, regional, and local levels, as applicable. Identify all locations that will be used to support any contract resulting from this RFP and the operations handled from these locations. VITA policy requires that all Commonwealth data must stay within the

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Continental U.S. Clearly identify any overseas locations that may be used to support the resultant contract or any related data transactions.

### **5. Strategic Relationships**

Please identify any and all strategic relationships with other related Suppliers you have or anticipate having support for any project resulting from this RFP. Identify all subcontractors expected to be employed and outsourced Service to be used in implementing the proposed solution. VDSS reserves the right to request that Supplier provide all the information described in this section for any and all major subcontractors proposed by Supplier.

### **6. ISO Certification**

Please indicate if your firm is ISO certified. Yes or no is sufficient. If "yes", identify the area(s) certified (e.g., services, manufacturing). Provide your experience with these certifications and the value they bring to your proposed Service.

## **C. Financial Information**

### **1. Total Annual Revenue**

Please state your total annual revenue and indicate the revenues associated with the provision of Services relevant to your proposal.

### **2. Dun and Bradstreet Credit Report**

Include your firm's current and previous three(3) years full D&B Business Report, if D&B issues reports on Supplier.

### **3. Annual Reports**

Please provide certified, audited financial statements (i.e., income statements, balance sheets, cash flow statements) for the most recent three (3) years. (Any Supplier that has been in business for a shorter period of time is requested to submit any available certified, audited annual financial statements.) VDSS may request copies of or access to current and historic annual reports. VDSS reserves the right to access a Supplier's publicly available financial information and to consider such information in its evaluation of such Supplier's proposal.

### **4. Research and Development**

State the percentage of your firm's total revenue invested in Research and Development, as appropriate.

### **5. Supplier Viability**

Are you currently under any investigation that might materially adversely impact the Services or your ability to deliver the Services you are proposing? If so, explain.

## **D. Future, Long Term Vision and Strategic Plans**

Provide information on your firm's future, long-term vision, and strategic plans as they relate to the direction of the proposed Service and describe a clear vision of how your firm plans to support emerging technologies and industry standards.

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## E. Supplier Experience Level and Customer References

You should have a demonstrable, proven record of providing Services similar to those described in Section 5, to customers of similar scope and complexity.

Respondents to this RFP must be a Salesforce certified consulting partner. The current Salesforce certification tiers are described at the following link: <https://go.salesforce-partners.com/consultingpartner>. Supplier must provide evidence of certification to include reference in the SalesForce AppExchange. Those firms that are not a Salesforce certified consulting partner will not advance in the evaluation process.

In addition, respondents to this RFP should possess the following minimum experience:

1. DDI and integration experience creating CCWIS solutions on the Salesforce LCAP.
2. DDI and integration experience migrating Eligibility and Enrollment solutions on the Salesforce LCAP.
3. Access to and experience with Salesforce Accelerator Services, and,
4. Access to and experience accelerating DDI and integration of applications using Salesforce Lightning pre-built component accelerators.

Any SOW issued pursuant to an awarded Contract pursuant to this RFP may require specific Salesforce programmer certifications for Key Personnel, including the following:

1. Certified Technical Architect
2. Platform Developer I
3. Platform Developer II
4. Javascript Developer

Supplier must have the ability to staff its projects with Key Personnel having such minimum qualifications, and if Supplier cannot demonstrate in its proposal the ability to staff qualified individuals (through example resumes with applicable certification levels listed) it may not advance in the evaluation process.

Please provide three customer references that can address **the minimum qualifications 1-4 above**, with contact names, email addresses, phone numbers, solution and service descriptions, and dates implemented that VDSS may use as a reference check in evaluating your proposal. VDSS will make such reasonable investigations as deemed proper and necessary to determine the ability of a Supplier to perform a resultant contract. These may include, but may not be limited to, reference checks and interviews. The references should be from organizations where Supplier is providing (or has provided) Services that are similar in type and scope to those identified in Section 5.

### 1. Supplier Reference #1: Reference's Organization Name \_\_\_\_\_

Reference's Current Point of Contact Name	Point of Contact Email	Point of Contact Phone Number	Reference's Contract No.
Reference's Project Manager	Project Manager E-mail	Project Manager Phone Number	Project Description

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Reference's Contract Manager	Contract Manager E-mail	Contract Manager Phone Number	Date Implemented

## 2. Supplier Reference #2: Reference's Organization Name

Reference's Current Point of Contact Name	Point of Contact E-mail	Point of Contact Phone Number	Reference's Contract No.
Reference's Project Manager	Project Manager E-mail	Project Manager Phone Number	Project Description
Reference's Contract Manager	Contract Manager E-mail	Contract Manager Phone Number	Date Implemented

## 3. Supplier Reference #3: Reference's Organization Name

Reference's Current Point of Contact Name	Point of Contact E-mail	Point of Contact Phone Number	Reference's Contract No.
Reference's Project Manager	Project Manager E-mail	Project Manager Phone Number	Project Description
Reference's Contract Manager	Contract Manager E-mail	Contract Manager Phone Number	Date Implemented

In addition, please provide a synopsis or case study of results attributable to your commitment to high quality and increased operating efficiency. This is requested to demonstrate the added value your firm can offer and indicate the typical on-going cost reductions and Service efficiencies VDSS could expect to realize.

## F. Performance Standards Methodology

Please describe the methodology used to develop your firm's internal performance standards, the processes and tools used to monitor and measure performance against those standards, and the management reporting systems that capture this data.

In particular, please describe your firm's ability to complete Salesforce integration projects within the approved scope, schedule, and budget. When projects have not been completed within these parameters, please explain what the deviation was and describe the monetary amount and/or schedule extension in any resulting contract modification(s).

Indicate your firm's present customer satisfaction rating, summarize customer satisfaction criteria, and describe the methodology used to measure customer satisfaction. Please include any relevant publication ratings or articles.

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## **G. Governance and Compliance Management**

Please describe your firm's management processes that ensure governance and compliance with all federally mandated laws and regulations used by your industry, and in provision of your services to your customers. Also, please provide a detailed description on how you will provide governance and compliance with any of VDSS's required security and data privacy requirements, or any other requirements specified in this RFP, that are not currently managed by your firm, but that you will be willing to do should an award be made to your firm.

## **H. Security Risk Management Overview**

Please provide an overview of your firm's comprehensive security risk management processes including your application, monitoring, and management of the controls used. Provide details as to how you establish the context for security risk-based decisions, how you assess the risk, how you respond to the risk once it's determined, and how you monitor the risk on an ongoing basis using communications and feedback for continuous improvement within your organization.

## **I. Disaster Recovery/Security Plan**

Describe in detail your firm's plans to mitigate against any disaster that would affect the ability to provide VDSS with the proposed Service. Provide a detailed plan of your firm's security infrastructure including, facility and information technology security. Provide your firm's plans of action for the following security incidents, as applicable to the RFP:

- Interruption of service including denial of service attacks
- Vulnerability incidents
- Data loss or compromise
- Insider attacks

## **J. Service and Support Management**

### **1. Post Implementation and Account Management Plan**

Provide a detailed description of the approach that your firm would recommend in order to achieve maximum Service Levels within a minimal amount of time following Service implementation. This should include a description of the approach your firm would take to provide O&M Services, if requested by VDSS.

### **2. Account Management Plan**

Provide a detailed description of the approach that your firm would take in order to manage the business and performance aspects of an awarded contract. Provide a detailed description of the approach your firm would take to support self-sufficiency of a public body with respect to the Services and the transition of Services management to a public body requesting such transition.

By submitting a proposal, you agree that you shall, if awarded a contract pursuant to this RFP, consent to participation in the meeting(s) of the Steering Committee described in the Steering Committee section of the VDSS Information Technology Solution Contract template found in Appendix F to this RFP. Please identify the titles and areas of responsibility of persons within your firm you would commit to serve on this Steering Committee.

### **3. Project Team**

- i. Once SOWs are issued, VDSS will require the resumes of all key members of the project team, including, if applicable, the following:

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Regional vice President(s) responsible for the VDSS account  
Account Manager  
Contract Administrator  
Project Managers  
Business Lead  
Technical Lead  
Data Lead  
Security Lead  
Testing Lead  
Architecture Lead

These key members of the project team shall be responsible for the accounts of VDSS. Please describe at a high level how you will staff potential projects resulting from this RFP.

- ii. Describe the level of access the proposed project team members have within your organization and the authority they have to commit resources to meet unexpected surges in activity and/or to respond to service issues.
- iii. Describe your firm's vetting practices, including background checks, fingerprinting and citizenship verification, for employees and subcontractors who have access to your firm's security infrastructure and cloud hosting operations (if your proposal offering includes hosting by your firm or a third party) and any federal vetting requirements that your firm currently complies with/has complied with. Also, describe how your firm would comply with a customer's particular security vetting requirements.
- iv. VDSS may require a Supplier to involve VDSS in the selection and rotation of any key account team members assigned to VDSS.

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## **7. SMALL BUSINESS (SWAM) SUBCONTRACTING PLAN**

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It is the policy of the Commonwealth to contribute to the establishment, preservation, and strengthening of small businesses and micro businesses, including those small or micro businesses owned by women, minorities, or service-disabled veterans; and to encourage their participation in Commonwealth procurement activities. Further, VDSS is committed to enabling a minimum of three percent (3%) participation by small businesses that are service disabled veteran-owned businesses, as defined in Code §§ 2.2-2000.1 and 2.2-4310, when contracting for information technology goods and services. The Commonwealth encourages all Suppliers to provide for the participation of these small businesses through partnerships, joint ventures, subcontracts, and other contractual opportunities.

Any business that is a small business, a small woman-owned business, a small minority-owned business, or a small service disabled veteran-owned business, as defined in Code § 2.2-4310 or § 2.2-1604, or a certified micro business as defined in Executive Order Number 35 (2019), is a “**SWaM**” business. No Supplier will be considered a SWaM business unless certified by the DSBSD by this RFP’s proposal due date and time. For information, go to: <http://www.sbsd.virginia.gov/>.

Please provide a Small Business Subcontracting Plan as set forth in Appendix B. Please state the amount of the overall commitment percentage that will be directly spent with SWaM subcontractors in performing the Requirements of the contract.

Describe in detail information on all mentor-protégé programs and participation that your firm is involved with.

Following contract award, Supplier(s) must submit a report including payments made to all subcontractors (including both SWaM-certified and non-SWaM certified subcontractors) in accordance with the “Small Business Procurement and Subcontracting Spend” section of the contract.

All amounts paid to SWaM-certified businesses are subject to monitoring and enforcement mechanisms. Failure to obtain the proposed participation percentages in accordance with the SWaM Subcontracting Plan may result in breach of the contract.

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## **8. PRICING INFORMATION**

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VDSS requests that each Supplier provide rate cards for the roles and project classifications outlined in Appendix C.

Additional information and backup detail should be attached as appropriate. Any scheduled price change must be identified, and actual new prices and proposed effective dates must be stated.

You must be willing and able to successfully provide the Service proposed for the prices given and to complete the project on a firm fixed-price or time-and-materials basis.

The rate cards supplied with your proposal must be valid until an award has been made.

Suppliers are encouraged to disclose pricing assumptions wherever possible. For example, if unit price is based on a certain volume, that assumption should be indicated. Suppliers are also encouraged to clearly identify any discount targets/ranges available.

## 9. VDSS STANDARD CONTRACT

Any resulting agreement will be defined by a written contract, which shall be binding only when fully executed by both parties. A copy of VDSS's standard Information Technology Service Contract is provided as part of this RFP as a separate MS Word document titled, "VDSS Information Technology Service Contract," - Appendix F. Depending on the type of Service proposed, the agreement may need to address licensing or hosting issues.

In the event that Supplier is a software reseller, VDSS will consider the software publisher's license agreement language if the software publisher requires an End User License Agreement ("EULA"). In such case, Suppliers are advised that VDSS will require Supplier to obtain VDSS's License Agreement Addendum to the EULA to address terms and conditions in that EULA that VDSS, as a government entity, by law or by policy, cannot agree.

If a Supplier's proposed Service requires VDSS to execute a EULA, Supplier shall contact the SPOC, who will provide Supplier with VDSS's "License Agreement Addendum" terms.

You must complete and submit a copy of the "VDSS Information Technology Service Contract" with all changes indicated in redline format for VDSS's review and evaluation along with your proposal, as well as a completed table in the format provided in Appendix G, "RFP Section 9.0 - Supplier Exceptions to VDSS Contract Template" setting forth your rationale and reasons for each of the proposed modifications. Only exceptions or recommended language revisions submitted with your proposal will be considered during negotiations.

**Please note**, exceptions or recommended language revisions to the liability provisions of the contract will not be considered at this time. If your firm is selected to go forward into negotiations, you will be required to state any exceptions to any liability provisions contained in the Request for Proposal and the VDSS Information Technology Service Contract Template at that time via email to the designated VDSS SPOC.

All Suppliers are encouraged to utilize the SPOC to address any questions you may have regarding any part of the VDSS Information Technology Service Contract.

Include the completed table below in your response to this RFP.

Issue:	Supplier's response (Y & N)
Do you agree that the contents of your response to Sections 5, 7, 8, and Appendix E will become part of any contract that may be entered into as a result of this RFP?	
Will you agree to begin measuring the Service Levels ( <u>Appendix A</u> ) within 60 days of the start of the implementation of the Service?	
The contract will include performance standards, measurement criteria and significant corresponding financial remedies.  Do you agree to include the Service Levels and remedies for non-compliance as defined in <u>Appendix A</u> in the final contract?	
Do you agree to include mutually agreed upon cost reduction initiatives, which will be periodically updated during the term of the contract?	

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<p>Do you agree that all provisions of the VDSS Contract NOT addressed by you in the <u>Appendix G</u> table are acceptable?</p>	
<p>Do you acknowledge that you will submit a Supplier Procurement and Subcontracting Plan stating whether or not and how you will be utilizing small businesses in your proposal? See Section 7.</p>	
<p>Supplier acknowledges that no federal funds may be used to obtain any Service under a contract awarded, pursuant to this RFP, to any Supplier who appears on any excluded lists on the federal government's System for Award Management ("SAM") at <a href="https://www.sam.gov/SAM/">https://www.sam.gov/SAM/</a>.</p>	
<p>If Supplier proposes a Service that will require the Commonwealth to execute a EULA, either as a signed agreement or as "clickwrap", with a software manufacturer, Supplier shall, for each such software manufacturer, obtain the written consent of such software manufacturer to the terms and conditions of VDSS's "License Agreement Addendum" attached as Exhibit F to the VDSS Information Technology Service Contract and provide a copy of each such consent with its proposal.</p>	
<p>Do you affirm that your response meets all of the Must Have Factors listed in section 2.P.i?</p>	
<p>Do you affirm that your organization is properly registered with the Virginia State Corporation Commission to conduct business in the Commonwealth? Supplier is to complete <u>Appendix D</u> and submit with its proposal.</p>	
<p>Do you affirm that any anticipated partner or subcontractor that will provide Services directly to the Commonwealth is properly registered with the Virginia State Corporation Commission to conduct business in the Commonwealth? Supplier is to complete an additional <u>Appendix D</u> for all anticipated partners or subcontractors and submit with its proposal.</p>	

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<p>Do you affirm that your organization and all affiliates are current with all sales tax obligations to the Commonwealth as of the due date of the proposals in response to this RFP?</p>	
<p>Do you agree to accept the VITA <b>“Mandatory Contract Terms”</b> consisting of the:</p> <ul style="list-style-type: none"> <li>• “Core Contractual Terms”;</li> <li>• “Required eVA Terms and Conditions”; and</li> <li>• “Mandatory Internal Revenue Service (IRS) Publication 1075 (required for FTI data only)”</li> </ul> <p>The provisions of each are set forth at the following URL:</p> <p><a href="https://www.vita.virginia.gov/supply-chain/scm-policies-forms/mandatory-contract-terms/">https://www.vita.virginia.gov/supply-chain/scm-policies-forms/mandatory-contract-terms/</a></p>	

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## Appendix A – Service Level Agreements (SLAs)

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### Service Level Agreement (SLA)

The following table contains global SLAs that will apply to all projects. Additional SLAs may be negotiated per SOW.

Should VDSS choose to exercise its option to contract for Operations and Maintenance (O&M) Services from SI Partners, the SLAs for O&M will be in effect immediately after the ninety (90) day warranty period or warranty period as specified in the applicable SOW, ends.

#### Payment of Remedies to VDSS:

Any remedies assessed by VDSS shall be due and payable to VDSS no less than thirty (30) calendar days after Supplier's receipt of the notice of remedies owed, and if payment is not made by the due date, the amount of said remedies may be withheld or offset from future payments by VDSS without further notice. The Supplier shall be liable for all remedies imposed by VDSS. Any dispute between the Supplier and any Subcontractor regarding responsibility for any events giving rise to the imposition of the remedies shall not relieve the Supplier of its liability for said remedies. The following remedies shall be collected by VDSS as set forth in the table below regardless if a contractual claim has been filed related to the remedies.

In addition to the remedies outlined in this Performance Measures Table, VDSS may exercise all available rights and remedies under law and equity.

Performance Standard	Definition	Measurement	Measurement Period	Target Service Level	Remedy For Not Meeting Target Service Level
Critical Path Deliverable timely completion*	Actual date that a critical path deliverable is submitted to VDSS for Acceptance ("Actual Delivery Date") as compared to the planned delivery date for that critical path deliverable set forth in the then-current approved, baseline schedule ("Planned Delivery Date")	Actual Delivery Date is the same as the Planned Delivery Date	Monthly	100% (Meaning all planned deliverables have an Actual Delivery Date= the Planned Delivery Date) which equals a 100% success rate)	For each business day after the Planned Delivery Date that a given Deliverable is not provided to VDSS for Acceptance, the Contractor shall credit VDSS \$5000 per business day against the Critical Path Deliverable milestone payment.

Deliverables (non-critical path) timely completion*	Actual date that a non-critical path deliverable is submitted to VDSS for Acceptance (“Actual Delivery Date”) as compared to the planned delivery date for that non-critical path deliverable set forth in the then-current approved, baseline schedule (“Planned Delivery Date”)	Actual Delivery Date is the same as the Planned Delivery Date	Monthly	100% (Meaning all planned deliverables have an Actual Delivery Date= the Planned Delivery Date, which equals a 100% success rate)	For each business day after the Planned Delivery Date that a given Deliverable is not provided to VDSS for Acceptance, the Contractor shall credit VDSS \$1000 per business day against the non-critical path Deliverable milestone payment.
Correction of incomplete or unacceptable Deliverables	Supplier shall correct any Non-conformities that are identified by VDSS to Supplier in writing and re-submit the corrected Deliverable for re-review (“Actual Correction Date”) within five (5) business days (or such other period of time as agreed by VDSS and Supplier) of receipt of the applicable notice of Non-Conformities	Actual re-submission date within five (5) business days or other agreed upon time period	Monthly	99% (Meaning 99% of all submitted non-conformities in a given month are corrected and resubmitted for review within 5 business days (or other agreed upon time period))	For each business day that the Actual Correction Date is more than 5 business days (or other agreed upon time period) after receipt of notice of nonconformity by VDSS, the Supplier shall credit VDSS \$ 1000 per day against the Deliverable milestone payment.
Compliance Code Coverage Policy	Supplier's code will comply with Salesforce Code Coverage Policy that is identified in Appendix I – Salesforce Best Practices – a minimum of 75% Coverage is required before	Actual Unit testing code coverage required is 75% (in accordance with Salesforce Coverage Policy)	Final delivery of Unit Integration Test prior to deploying code into the next phase	100% (Required percentage of time Supplier must comply with Salesforce Code)	If the Supplier's Actual Unit testing code coverage is less than the 75% code coverage required following final delivery of Unit Integration Test, the Supplier shall credit VDSS \$5000 against the corresponding milestone payment, and Supplier shall

	deploying code to the next phase			Coverage Policy)	remediate the code coverage deficiencies within three (3) business days. If remediation of Supplier's failure to reach 75% code coverage exceeds three (3) business days, Supplier shall also credit VDSS an additional \$1000 per day (beginning the fourth day) against the corresponding milestone payment until 75% Actual Unit testing code coverage is reached. If remediation of Supplier's failure to reach 75% code coverage exceeds ten (10) business days, VDSS may terminate the SOW for breach and move to a new Supplier.
Correction of unit integration testing defects	Supplier shall correct any defects identified by VDSS during unit integration testing and re-deploy to the unit integration testing environment within three (3) business days of Supplier's receipt of the applicable notice of such defects from VDSS ("Actual Correction Date"); after such time, VDSS will re-test to confirm	Actual correction and resubmission of evidence of correction of defect(s) within three (3) business days of Supplier's receipt of the applicable notice of defects	Upon completion of unit integration testing	100% (Meaning 100% success in the correction and resubmission of all defects within 3 business days as required)	After receipt of a notice of defects by VDSS, for each business day beyond the required three business days the Contractor fails to correct the identified defects and deploy the Solution to the unit testing environment for re-test, the Contractor shall be assessed \$1000 per day.

	identified defects have been corrected.				
Correction of system integration defects	<p>Supplier shall correct any Critical Defects identified by VDSS during system integration testing and re-deploy the corrected Solution to the testing environment within twenty-four (24) hours of receipt of the applicable notice of such defects from VDSS. After such time, VDSS will re-test to confirm the identified defects have been corrected.</p> <p>Supplier shall correct any High Defects identified by VDSS during system integration testing and re-deploy the corrected Solution to the testing environment within seventy-two (72) hours of receipt of the applicable notice of such defects from VDSS. After such time, VDSS will re-test the Solution to confirm identified defects have been corrected.</p>	<p>Actual correction and resubmission of evidence of correction of defect(s) within twenty-four (24) hours for Critical Defects</p> <p>Actual correction and resubmission of evidence of correction of High defects within seventy-two (72) hours for High Defects</p>	Upon completion of system integration testing	100% (Meaning 100% successful correction of all defects within required timeframes to the left)	For each 24 hours beyond(a) the first 24 hours after defect validation for Critical Defects or (b) 72 hours after defect validation for High Defects, that Contractor fails to deploy the Solution to the system integration testing environment for re-test, the Contractor shall be assessed \$2000 per day.

Correction of User Acceptance Testing (UAT) defects	<p>Supplier shall correct any Critical Defects identified by VDSS during UAT and re-deploy the corrected Solution to the testing environment within twenty-four (24) hours of receipt of the applicable notice of such defects from VDSS. After such time, VDSS will re-test the Solution to confirm identified defects have been corrected.</p> <p>Supplier shall correct any High Defects identified by VDSS during UAT and re-deploy the Solution to the testing environment within seventy-two (72) hours of receipt of the applicable notice of such defects from VDSS. After such time, VDSS will re-test the Solution to confirm the identified defects have been corrected.</p>	<p>Actual correction and resubmission of evidence of correction of Critical Defect(s) - exceeds twenty-four (24) hours</p> <p>Actual correction and resubmission of evidence of correction of High Defect(s) exceeds seventy-two (72) hours</p>	Upon completion of UAT	100%	For each day more than (a) 24 hours after defect identification, for Critical Defects and (b) 72 hours for High Defects after defect identification, that Contractor fails to deploy the Solution to the UAT environment for re-test, the Contractor shall be assessed \$2000 per day.
Incident response time	All incidents responded to within one (1) hour with updates provided to VDSS every 30 minutes until incident is resolved	(Total incidents responded to by Contractor within one (1) hour of an incident service request, divided by total number of	Monthly during O&M	99.9% (required monthly average incident response time	Monetary credit of 35% of the O&M monthly service invoice

		incident service requests placed) *100		for all incidents)	
Incident resolution time: Severity 1 (<=3 hours) Severity 1 incident = critical priority. Critical production issue that severely impacts the service or the system is down, including production issues caused by misconfiguration of Components by Supplier on VDSS systems.	% of incidents resolved within the 3-hour timeframe Severity 1 incidents	(Total Severity 1 incidents resolved within 3 hours of the service request, divided by total Sev 1 incidents resolved) *100	Monthly during O&M	99.9% (required monthly average Sev 1 incident resolution time)	Monetary credit of 35% of the monthly O&M service invoice
Incident resolution time: Severity 2 (<=6 hours) Severity 2 incident = high priority. Critical situation where functionality is impacted, or customer experience is seriously degraded, including production issues caused by misconfiguration of Components by Supplier on VDSS systems.	% of incidents resolved within the 6-hour timeframe. <b>Note:</b> If an incident is escalated to Severity 2, then the resolution time measurement restarts upon escalation to Severity 2	(Total Severity 2 incidents resolved within 6 hours of the service request, divided by total resolved Severity 2 incidents) *100	Monthly during O&M	98% (required monthly average Sev 2 incident resolution time)	Monetary credit of 30% of the monthly O&M service invoice
Incident resolution time: Severity 3 (<=1 calendar - day) Severity 3 incident = medium priority. A partial loss of service with a	% of incidents resolved within the 1 calendar day timeframe.	(Total Severity 3 incidents resolved within 1 calendar day of the service request, divided by	Monthly during O&M	96% (required monthly average Sev 3 incident	Monetary credit of 20% of the monthly O&M service invoice

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medium to low impact on the VDSS. VDSS is still able to function, including production issues caused by misconfiguration of Components by Supplier on VDSS systems.		total resolved Severity 3 incidents) *100		resolution time)	
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Critical Defect – A Non-Conformity that causes the entire system to be unavailable for System Integration Testing and/or UAT testing. There is not workaround to continue testing.

High Defect – A Non-Conformity that causes a material component of the system to be unavailable for System Integration and/or UAT testing. A workaround permits UAT testing to continue on other system components.

\*Critical Path and Non-Critical Path Deliverables will be defined in any issued Statements of Work.

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## Appendix B – Small Business (SWaM) Subcontracting Plan

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Supplier must complete and submit a Small Business (“**SWaM**”) Subcontracting Plan using this template.

In order for a Supplier’s Small Business Subcontracting Plan to be awarded points for the SWaM Participation evaluation criterion, either Supplier or Supplier’s proposed subcontractor(s) must hold an active State of Virginia Department of Small Business and Supplier Diversity (“**DSBSD**”) SWaM certification prior to the due date and time for receipt of proposals. This includes small women, small minority, or service disabled veteran-owned businesses when they have received DSBSD small business certification.

Supplier Name: \_\_\_\_\_

Preparer Name: \_\_\_\_\_ Date: \_\_\_\_\_

Instructions:

- B. If Supplier is certified by DSBSD as a small business or as a micro business, complete only Section A of this form.

Suppliers that are DSBSD certified small or as a micro businesses will receive the maximum available points for the SWaM Participation evaluation criterion.

- C. If Supplier is not a DSBSD certified small or micro business but plans to utilize DSBSD certified small or micro business subcontractor (s) in performing the requirements of the contract, complete Section B of this form.

For the Supplier to receive points for the SWaM Participation evaluation criterion, the Supplier shall state the amount of the overall spend utilization commitment percentage that will be directly with SWaM subcontractors in performing the Requirements of the contract. Points will be scaled based on commitment percentage amount.

- D. If Supplier is not a DSBSD certified small or micro business and does not plan to utilize DSBSD certified small or micro business subcontractor(s) in performing the requirements of the contract, please so state:

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Suppliers that are not certified small businesses and do not plan to use certified small business subcontractors will not receive any points for the SWAM Participation evaluation criterion.

#### Section A

If your firm is certified by the Department of Small Business and Supplier Diversity, provide your certification number and the date of certification. Supplier must include a copy of DSBSD certification with its proposal:

Certification number: \_\_\_\_\_ Certification Date: \_\_\_\_\_

#### Section B

Populate the table below to show Supplier's overall commitment percentage that will be directly spent with SWAM subcontractors in performing the Requirements of the contract. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. This shall not exclude DSBSD-certified micro businesses or women, minority, or service disabled veteran-owned businesses when they have received the DSBSD small business certification. Note: this proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation percentages may result in breach of the contract.

**SUPPLIERS MUST PROVIDE UTILIZATION COMMITMENT PERCENTAGES IN ORDER TO RECEIVE POINTS. IN CASE OF INCONSISTENCY OF LINE ITEM AND TOTAL, TOTAL WILL BE USED.**

#### B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

Small Business Name & Address  DSBSD Designation and Certificate #	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement	Spend utilization commitment percentage

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<p>SWaM Total Commitment Percentage:</p> <p>Please state here the total spend commitment percentage for DSBSD-certified SWaM businesses directly performing the Requirements of this Contract</p>				

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## Appendix C – Pricing

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Supplier should provide three rate cards based on the roles and project parameters below. Supplier should provide separate rates for small, medium, and large projects. The table below is an example of the types of roles VDSS would expect on the projects. Supplier may add additional positions.

Resource Personnel/Position	Description	Hourly Rate
Project Executive		
Project/Account Manager		
Business Lead		
Technical Lead		
Data Lead		
Security Lead		
Testing Lead		
Architecture Lead		
Platform Developer I		
Platform Developer II		
Platform App Builder		
Tester		
Training/Implementation Manager		
Configuration Specialist/Administrator		

Project Parameters:

- Small: budget \$5M, < 9 months
- Medium: budget \$5.1 to 10M, 10-14 months
- Large > \$10M, high complexity, multiple interfaces/integrations, > 15 months

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## **Appendix D – State Corporation Commission Form**

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Virginia State Corporation Commission (“SCC”) registration information. The Supplier:

- is a corporation or other business entity with the following SCC identification number:  
\_\_\_\_\_ -OR-
- is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust -OR-
- is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the Supplier in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Supplier’s out-of-state location) -OR-
- is an out-of-state business entity that is including with this proposal an opinion of legal counsel that accurately and completely discloses the undersigned Supplier’s current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

**\*\*NOTE\*\* >>** Check the following box if you have not completed any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals (the Commonwealth reserves the right to determine in its sole discretion whether to allow such waiver):

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## **APPENDIX E – REQUIREMENTS**

(See separate file)

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## **Appendix F – VDSS Information Technology Service Contract**

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(See separate file)

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## APPENDIX G – SUPPLIER EXCEPTIONS TO VDSS CONTRACT TEMPLATE

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Note to Supplier: You may add rows as needed or change the layout for this page to landscape.

Page Number	Contract Section/Subsection	Exception Explanation

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**APPENDIX H – VDSS DELIVERY METHODOLOGY**

**HYBRID AGILE METHODOLOGY**

(See separate file)

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## **APPENDIX I – SALESFORCE BEST PRACTICES**

(See separate file)

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## **APPENDIX J – SYSTEM INTEGRATOR CONTROLS**

(See separate file)

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**APPENDIX K – SALESFORCE CODE REVIEW  
CONTROLS AND STANDARDS**

**(See separate file)**

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## APPENDIX L – EXAMPLES OF POTENTIAL PROJECTS

### Eligibility and Enrollment

The Eligibility and Enrollment broadly provides functions associated with screening and eligibility determination through benefits issuance for health and human services programs. Once benefits (other than Medicaid) are issued the case stays open (as long as the household remains eligible) and any changes or renewals are entered into the case in Eligibility and Enrollment. Benefits available include:

- Child Care Support Program
- Supplemental Nutritional Assistance Program
- Low Income Heating and Energy Assistance Program (LIHEAP)
- Temporary Assistance for Needy Families
- Health Care Coverage (Families and Children)
- Health Care Coverage (Aged, Blind, Disabled and Medicare Part D Costs Savings Program)

The case management functions for benefitting programs that use Eligibility and Enrollment comprise a range of foundational services from application to benefit issuance. The Medicaid eligibility decision is sent via interface to the Department of Medical Assistance Services (DMAS) system, where coverage and payment are managed. The “case” remains open as long as the household is eligible.

In general, the Eligibility and Enrollment migration project comprises moving the Eligibility and Enrollment application functions and the technical EA assets used by Eligibility and Enrollment “as-is” to the enterprise platforms. VDSS does not intend to add to the Eligibility and Enrollment functionality during this project. The nature and scope of the Eligibility and Enrollment project activities, project organization, state and contractor resource needs, and description of the anticipated system life for the required resources are described in the following text.

### Comprehensive Child Welfare Information System (CCWIS)

The purpose of the CCWIS project is to implement the functional and non-functional design requirements for a CCWIS that supports the vision and business needs of VDSS and complies with the federal CCWIS rules. The VDSS requires a CCWIS compliant system that includes the following functionalities:

- Intake Management (Intake, Screening, Investigation, Assessment)
- Foster Care Prevention
- Eligibility - Title IV-E and Other Programs (Initial Eligibility Determination, Changes in Eligibility)
- Case Management (Service/Case Plan, Case Review/Evaluation, Monitoring Service/Case Plan Service)
- Resource Parent Management (Facility Support, Foster/Adoptive Homes Support, Resource Directory Management, Contract Support)
- Court Processing (Court Documents, Notifications, Tracking, Indian Child Welfare Act)

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- Financial Management (Payment Accounts, Payment Processing, Special Welfare Accounts, Requisition and Approval Flow)
- Document Management
- E-signature Capability
- Report Services (real-time, monthly, quarterly, annual, and ad hoc reporting)
- Case Management Assessment Tools [Structured Decision Making (SDM); Family Strength & Needs Assessment (FSNA); Virginia Enhanced Maintenance Assessment Tool (VEMAT); and the Child and Adolescent Needs and Strengths (CANS)]
- Seamless interface for mobile device access
- Seamless interface for external stakeholder access

### **Product Specifications & Standards**

Projects for which SOWs will be issued subsequent to the award of contract(s) from this RFP will vary. For each subsequent project, functional and technical requirements will be included in the separate SOWS to include the following:

- Product Specifications and Standards
- Functional Requirements
- Supplier Managed Staff Augmentation System Functionality
- Security Features of the Application
- Cloud Requirements
- Reports
- eVA System Interface Requirements

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## APPENDIX M - FEDERAL CLAUSES

In accordance with this RFP, the Contractor shall comply with all applicable federal, state and local rules and regulations, including, but not limited to, the Acts described below. The following provisions, as applicable, are incorporated into the RFP and Contract: 45 CFS Part 75 Appendix II C-Equal Employment Opportunity; The Clean Air Act (42 U.S.C. 7401- 7671q) and the Federal Water Pollution Control Act, as amended (33 U.S.C. 1251-1387); The Copeland "Anti-Kickback" Act (40 U.S.C. 3145) and Department of Labor regulations (29 CFR Part 3), The Byrd Anti-Lobbying Amendment (31 U.S.C. 1352); Non-Discrimination on the Basis of Disability in State and Local Government Services (28 CFR Part 35, Title II, Subtitle A); Davis-Bacon Act (40 U.S.C. 3141-3148); SUSPENSION AND DEBARMENT (Executive Order 12549 (1986), Executive Order 12689 (1989), 2 C.F.R. Part 3000; CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701; Access to Systems and Records (45 CFR 95.615); and Software and Ownership Rights (45 CFR 95.617).

### **EQUAL EMPLOYMENT OPPORTUNITY ACT:**

Except as otherwise provided under 41 CFR part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, Equal Employment Opportunity (30 FR 12319, 12935, 3 CFR 1964-1965 Comp., p. 339) as amended by Executive Order 11375 amending Executive Order 11246 Relating to Equal Employment Opportunity, and implementing regulations at 41 CFR part 60.

### **CLEAN AIR AND FEDERAL WATER POLLUTION CONTROL ACT:**

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended. Contracts and subgrants of amounts in excess of \$150,000 must contain A10.2 a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). (2 CFR 200, Subpart F, Appendix II)

### **COPELAND "ANTI-KICKBACK" ACT (40 U.S.C. 3145), AS SUPPLEMENTED BY DEPARTMENT OF LABOR REGULATIONS (29 CFR PART 3) :**

The Copeland "Anti-kickback" Act (40 U.S.C. 3145) prohibits a federal building contractor or subcontractor from inducing an employee into giving up any part of the compensation that he or she is entitled to under the terms of his or her employment contract.

Department of Labor regulations (29 CFR Part 3) applies to any contract which is subject to Federal wage standards and which is for the construction, prosecution, completion, or repair of public buildings, public works or buildings or works financed in whole or in part by loans or grants from the United States.

### **BYRD ANTI-LOBBYING ACT:**

This Act prohibits the recipients of federal contracts, grants, and loans from using appropriated funds for lobbying the Executive or Legislative branches of the Federal government in connection with a specific contract, grant, or loan. As required by Section 1352, Title 31 of the U.S. Code and implemented at 2 CFR 200, Subpart F, Appendix II, for persons entering into a grant or cooperative agreement over

### **AMERICANS WITH DISABILITIES ACT:**

This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

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**DAVIS-BACON ACT (40 U.S.C. 3141-3148):**

The Davis-Bacon and Related Acts apply to contractors and subcontractors performing on federally funded or assisted contracts in excess of \$2,000 for the construction, alteration, or repair (including painting and decorating) of public buildings or public works. Davis-Bacon Act and Related Act contractors and subcontractors must pay their laborers and mechanics employed under the contract no less than the locally prevailing wages and fringe benefits for corresponding work on similar projects in the area.

The Davis-Bacon Act directs the Department of Labor to determine such locally prevailing wage rates. The Davis-Bacon Act applies to contractors and subcontractors performing work on federal or District of Columbia contracts. The Davis-Bacon Act prevailing wage provisions apply to the "Related Acts," under which federal agencies assist construction projects through grants, loans, loan guarantees, and insurance.

For prime contracts in excess of \$100,000, contractors and subcontractors must also, under the provisions of the Contract Work Hours and Safety Standards Act, as amended, pay laborers and mechanics, including guards and watchmen, at least one and one-half times their regular rate of pay for all hours worked over 40 in a workweek. The overtime provisions of the Fair Labor Standards Act may also apply to DBA-covered contracts.

**DRUG FREE WORKPLACE STATEMENT**

The Federal government implemented the Drug Free Workplace Act of 1988 in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides. Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:

- a. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the workplace.
- b. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
- c. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
- d. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

**SUSPENSION AND DEBARMENT (Executive Order 12549 (1986), Executive Order 12689 (1989), 2 C.F.R. Part 3000)**

Debarment and Suspension (Executive Orders 12549 and 12689). (1) This contract is a covered transaction for purposes of 2 C.F.R. pt. 180 and 2 C.F.R. pt. 3000. As such, the contractor is required to verify that none of the contractor's principals (defined at 2 C.F.R. § 180.995) or its affiliates (defined at 2 C.F.R. § 180.905) are excluded (defined at 2 C.F.R. § 180.940) or disqualified (defined at 2 C.F.R. § 180.935).

**CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. 3701)**

Contract Work Hours and Safety Standards Act (40 U.S.C. 3701–3708). The combined total value of the master agreement and its addenda may exceed \$100,000. If the Party employs mechanics or laborers for this work, it must comply with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5) regarding computation of wages, payment of overtime, and working conditions.

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#### **ACCESS TO SYSTEMS AND RECORDS (45 CFR 95.615)**

The State agency must allow the Department access to the system in all of its aspects, including pertinent state staff, design developments, operation, and cost records of contractors and subcontractors at such intervals as are deemed necessary by the Department to determine whether the conditions for approval are being met and to determine the efficiency, economy and effectiveness of the system.

#### **SOFTWARE AND OWNERSHIP RIGHTS (45 CFR 95.617)**

(a) General. The State or local government must include a clause in all procurement instruments that provides that the State or local government will have all ownership rights in software or modifications thereof and associated documentation designed, developed or installed with Federal financial participation under this subpart.

(b) Federal license. The Department reserves a royalty-free, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use and to authorize others to use for Federal Government purposes, such software, modifications, and documentation.

(c) Proprietary software. Proprietary operating/vendor software packages which are provided at established catalog or market prices and sold or leased to the general public shall not be subject to the ownership provisions in paragraphs (a) and (b) of this section. FFP is not available for proprietary applications software developed specifically for the public assistance programs covered under this subpart

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## APPENDIX N – PROPRIETARY/CONFIDENTIAL INFORMATION IDENTIFICATION

Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the *Virginia Freedom of Information Act*; however, the Offeror must invoke the protections of § 2.2-4342F of the *Code of Virginia*, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected including the section of the proposal in which it is contained and the page numbers, and state the reasons why protection is necessary. The proprietary or trade secret material submitted in the original and all copies of the proposal must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. In addition, a summary of proprietary information submitted shall be submitted on this form. The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the Offeror refuses to withdraw such a classification designation, the proposal will be rejected.

Personally Identifiable Information “PII” is considered confidential and protection must be sought to ensure that such information is not released. PII includes any information that permits the identity of an individual to be directly or indirectly inferred, including any information that is linked or linkable to that individual, regardless of whether the individual is a U.S. citizen, lawful permanent resident, visitor to the U.S., or employee or contractor to the Commonwealth. If it is necessary for consideration within this proposal to include PII, identify below and do not include in submitted redacted copies.

Name of Offeror (Firm): \_\_\_\_\_ invokes the protections of § 2.2-4342F of the *Code of Virginia* for the following portions of my proposal submitted on \_\_\_\_\_ Date \_\_\_\_\_

Solicitation # / Title:

Signature:

Title:

I certify that no portion of this bid / proposal is to be considered confidential and/or proprietary.

DATA/MATERIAL TO BE PROTECTED	SECTION NO., & PAGE NO.	REASON WHY PROTECTION IS NECESSARY