Allegheny County Department *of* Human Services
RFP Response Form

Client Management Information System Implementation and Support Services

PROPOSER INFORMATION

Proposer Name: CoreSphere, LLC.

Authorized Representative Name & Title: Mr. Shailesh Gupta, Managing Partner

Address: 10411 Motor City Drive, Suite 410, Bethesda, MD 20817-7007

Telephone: (301) 637-3216

Email: sgupta@coresphere.com

Website: www.coresphere.com

Legal Status: ☒ For-Profit Corp. ☐ Nonprofit Corp. ☐Sole Proprietor
☐Partnership

Date Incorporated: October 1, 2003

Partners and/or Subcontractors included in this Proposal: Public Consulting Group (PCG)

How did you hear about this RFP? Please be specific. Allegheny County Solicitations Website
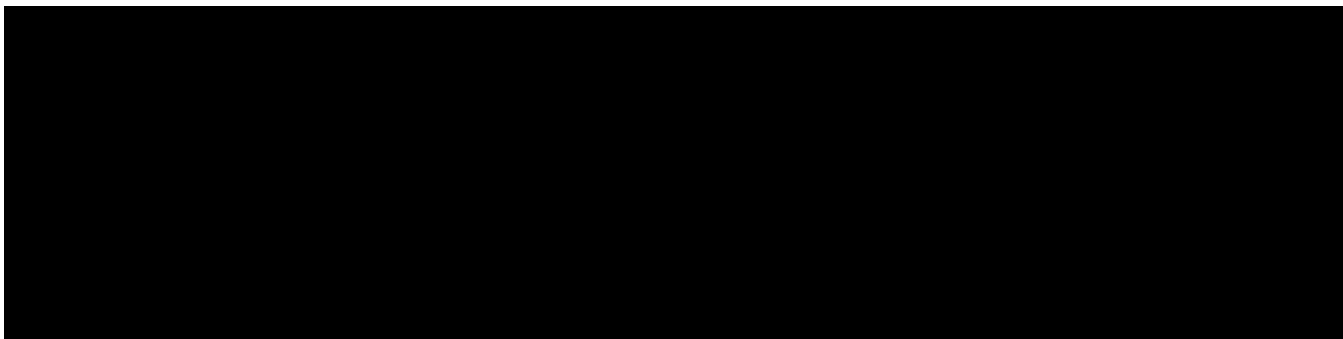
BOARD INFORMATION

Provide a list of your board members as an attachment or in the space below.
CoreSphere does not have any board members.
Board Chairperson Name & Title: N/A
Board Chairperson Address: N/A

Board Chairperson Telephone: N/A
Board Chairperson Email: N/A

REFERENCES

Provide the name, affiliation and contact information [include email address and telephone number] for three references who are able to address relevant experience with your organization. Please do not use employees of the Allegheny County Department of Human Services as

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PROPOSAL INFORMATION

Date Submitted **1/22/2020**

████████████████████

CERTIFICATION

Please check the following before submitting your Proposal, as applicable:

☒ I have read the standard County terms and conditions for County contracts and the requirements for DHS Cyber Security, EEOC/Non-Discrimination, HIPAA and Pennsylvania's Right-to-Know Law.

☒ By submitting this Proposal, I certify and represent to the County that all submitted materials are true and accurate, and that I have not offered, conferred or agreed to confer any pecuniary benefit or other thing of value for the receipt of special treatment, advantaged information, recipient's decision, opinion, recommendation, vote or any other exercise of discretion concerning this RFP.

Client Management Information System Implementation and Support Services

Choose one:

☒ My Proposal contains information that is either a trade secret or confidential proprietary information and I have included a written statement signed by an authorized representative identifying those portions or parts of my Proposal and providing contact information.

OR

☐ My Proposal does not contain information that is either a trade secret or confidential proprietary information.

ATTACHMENTS

Please submit the following attachments with your Response Form. These can be found at http://www.alleghenycounty.us/dhs/solicitations.
- MWDBE documents
- Allegheny County Vendor Creation Form
- 3 years of audited financial reports
- W-9

REQUIREMENTS

Please respond to the following and submit only one Response Form, even if you are responding to both services. Proposers should leave the sections for Services they are not proposing blank. Each Project will be scored separately and maximum score a Proposal can receive is 365 points for Implementation Services and 200 points for Technical Architecture and Governance Advisory Support Services. All Proposers should complete the Qualifications and Experience section. Complete this section only once, even if you are responding to both Services. To score each Proposal, your score from the Qualification and Experience section will be added to your response to the service-specific section(s) (Implementation Services and Technical Architecture and Governance Advisory Services).

The page limits for each section are as follows:
- Qualifications and Experience [3 pages],
- Implementation Services [20 pages] and
- Technical Architecture and Governance Advisory Support Services [12 pages].

You may attach screen shots or other visual aids as needed. These will not count toward the page limit. All Proposals must also include a completed Cost Proposal Response Template. The provided Template (available on the DHS Solicitations webpage) has a tab for Implementation and a tab for Technical Architecture and Governance Advisory Services. If you are only proposing to provide one Service, complete only that tab. The Cost Proposal Response Template will not count toward the page limit.

Client Management Information System Implementation and Support Services

**Requirements for All Proposals [30 points, 3 pages]:**

Qualifications and Experience [30 points]

1. *Describe your experience providing IT services and solutions like ours that you have successfully completed, and lessons learned from that work.*

CoreSphere has provided IT services and solutions in the Customer Relationship Management (CRM) systems domain since 2003, and Salesforce implementation services since 2009. We are a certified Salesforce Gold Tier consulting partner, having completed numerous Salesforce implementations for public sector entities and nonprofits similar to DHS such as the California and Maryland's Department of Human Services, U.S. Department of the Treasury, Centers for Medicare and Medicaid Services (CMS), Department of Housing and Urban Development (HUD), the Securities and Exchange Commission (SEC), the Library of Congress, the Housing Partnership Network (HPN), and NeighborWorks (NW) America, to name a few.

[redacted]

1. **Partnering with Customers** – project success is dependent on a successful partnership between CoreSphere and its customers. If both parties are not aligned and support the implementation, either the project fails or does not fully realize its objectives. Leveraging Agile management tools and processes, we engage and involve customers in all aspects of the implementation from project management to deployment, incorporating feedback and transferring knowledge throughout. Some techniques include but are not limited to joint envisioning sessions, sprint grooming and prioritization, and sprint retrospectives. We strongly encourage our customer partners to be involved in the implementation of non-critical path user stories and work items. As an example, CoreSphere was selected by NW to rearchitect and

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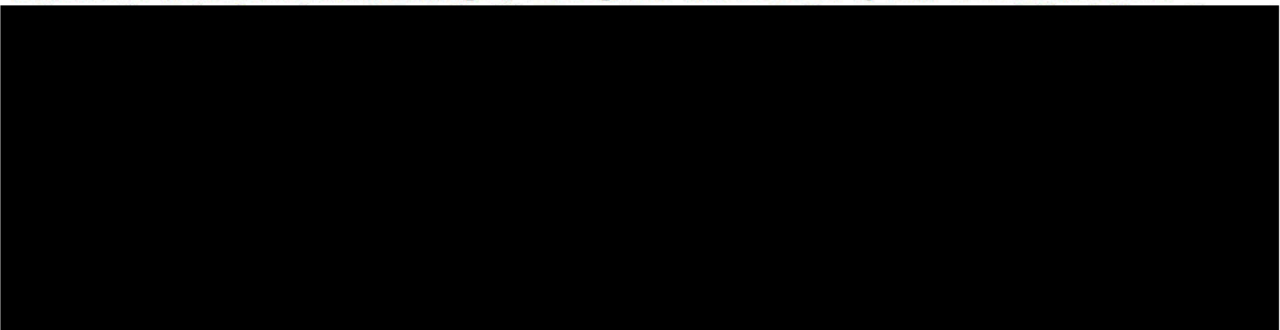
2. **Configuration First Approach** – Salesforce provides a very flexible and powerful platform where a lot can be accomplished through configuration. Most functionality can be delivered

through configuration while customization is typically used for complex logic. By conducting a thorough fit-gap analysis and always presenting multiple options to meet functionality (including one option for configuration), we encourage customers to minimize customization as much as possible. By adhering to strict governance processes and always reviewing the impact of selecting a customization approach, CoreSphere enables our customers to make informed decisions, resulting in less customization.

3. **User Experience Driven Approach** – Having seen numerous demos and videos, our partners ███ ███ ███ on each project to ensure that all parties are in lockstep, especially in environments like Allegheny County where there are numerous departments and CMIS stakeholders. This approach reduces re-work and ensures that the configured application meets expectations.

4. **Governance and Best Practices** – Governance and adherence to best practices is critical no matter how small or large the project. Customers that do not institute a level of Governance, albeit self-governance by adhering to best practices encounter long term problems and have a lower level of adoption as well as higher total cost of ownership. We encourage our customers to have a Governance Contractor in place ██ ███ ███ This ensures that our customers make good decisions while keeping the long term in mind. Our governance model is shown in *Exhibit 3*.

2. *Describe your organization's history of Salesforce implementation, including the structure and experience of the personnel designated for the project.*

CoreSphere has been delivering Salesforce based solutions to public sector customers since 2009 and bring more than a decade of Salesforce implementation excellence to Allegheny County's CMIS program. Our implementations have scaled from 5 users to over 2,000 users globally, and we have designed and developed Salesforce solutions for nonprofits such as the Housing Partnership Network and NeighborWorks America, as well as grants management solutions for the CDFI and HUD. We have experience across the entire Salesforce product suite including but not limited to:

- Service Cloud; Sales Cloud, CTI; Force.com Platform; Lightning Experience
- Integrations – Salesforce APIs; Data Migrations – Data Loader, Pentaho, Informatica
- Einstein Analytics; Box, Spring CM, MuleSoft, Fuse ESB
- Mobile Applications, Managed Packages and Application Development
- AppExchange Applications such as CongaComposer, DupeBlocker, DemandTools, Qualtrics, iContact, Dun & Bradstreet, KnowWho, DocuSign, Stripe, Setster, etc.
- Developing two AppExchange Products - ReadySpectGO and Launchpad CMS

Our proposed implementation team is highly qualified, and each team member maintains multiple, active certifications. We are engaged in the Salesforce developer community and our team regularly participates in Basecamp sessions and thought leadership at large. Our proposed team has experience working with similar health and human services agencies, enterprise

[redacted]

3. *Describe how you have approached change management with local or state government(s). Describe the biggest challenge you faced and how you plan to mitigate that challenge with DHS.*

CoreSphere has experience with both technology change/configuration management and Organizational Change Management (OCM) across a broad range of customers including the State of Maryland's Total Human Services Integrated Network (MD THINK) program where we have over 20 resources assisting the State in transforming and modernizing applications. OCM is a critical success factor to any major system implementation. Often organizations have a variety of team members with varied roles, workflow responsibilities and even varied experience and comfort with technology. We emphasize change management and adoption for all our implementations. Successful change management strategies ensure that change is strategically and systematically handled across the enterprise to minimize its impact on employees.

Our change management approach in alignment with the Implementation Roadmap defines targeted stakeholders, transformation activities and planned communications designed to support effective adoption and use of the planned solution. The biggest challenge we face is resistance to adopt and accept a technology solution primarily driven out of the fear of not being able to learn to adapt to the change or a fear of job replacement. We have learned that the more we educate, communicate, and train the users and show them how their job function and role will change for the better, the higher the level of adoption. Users need to understand the impact to them, the benefits to them and the impact the CMIS solution has on the DHS' mission to eliminate user uncertainty and fear. This is how we have approached previous implementations successfully. Our team's approach to change management is featured and summarized in *Exhibit 5*.
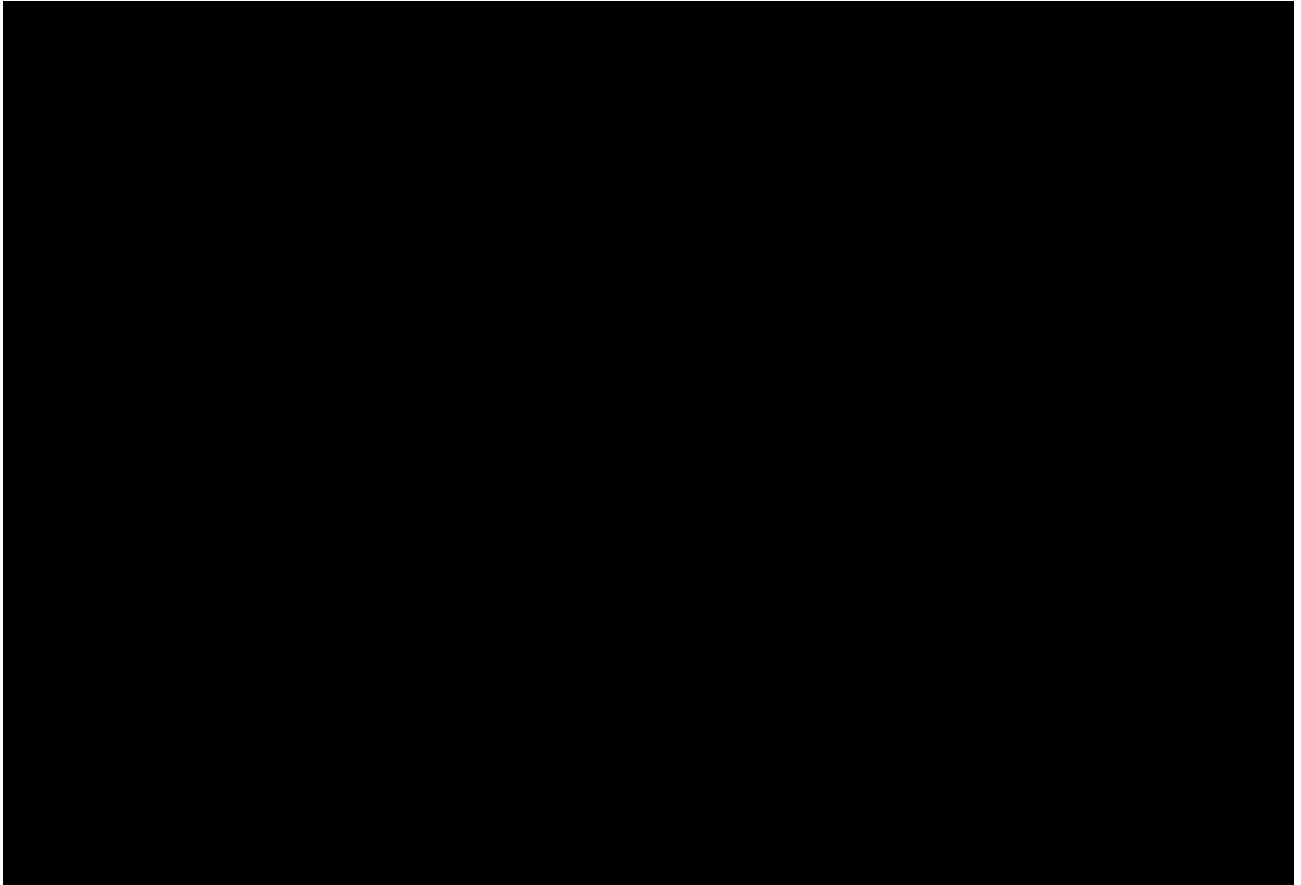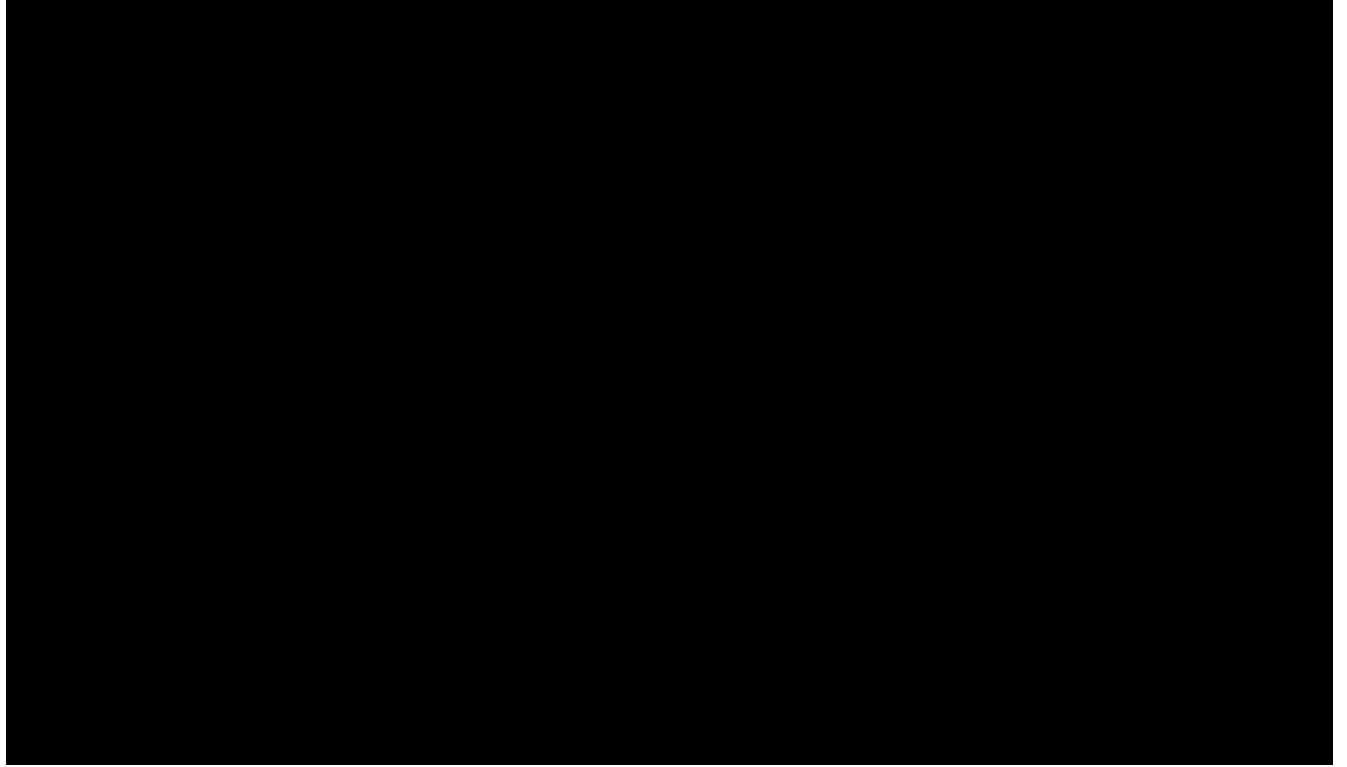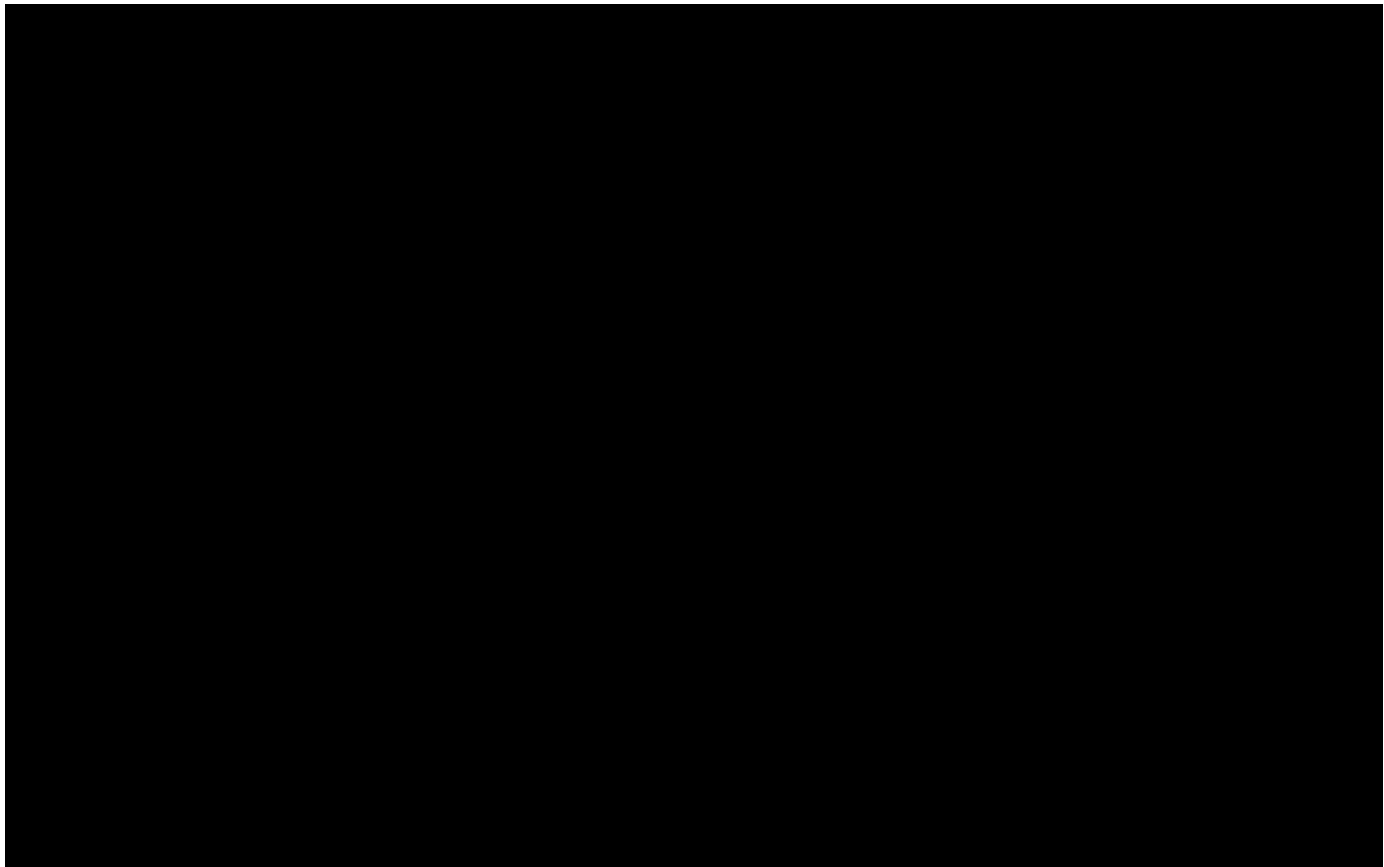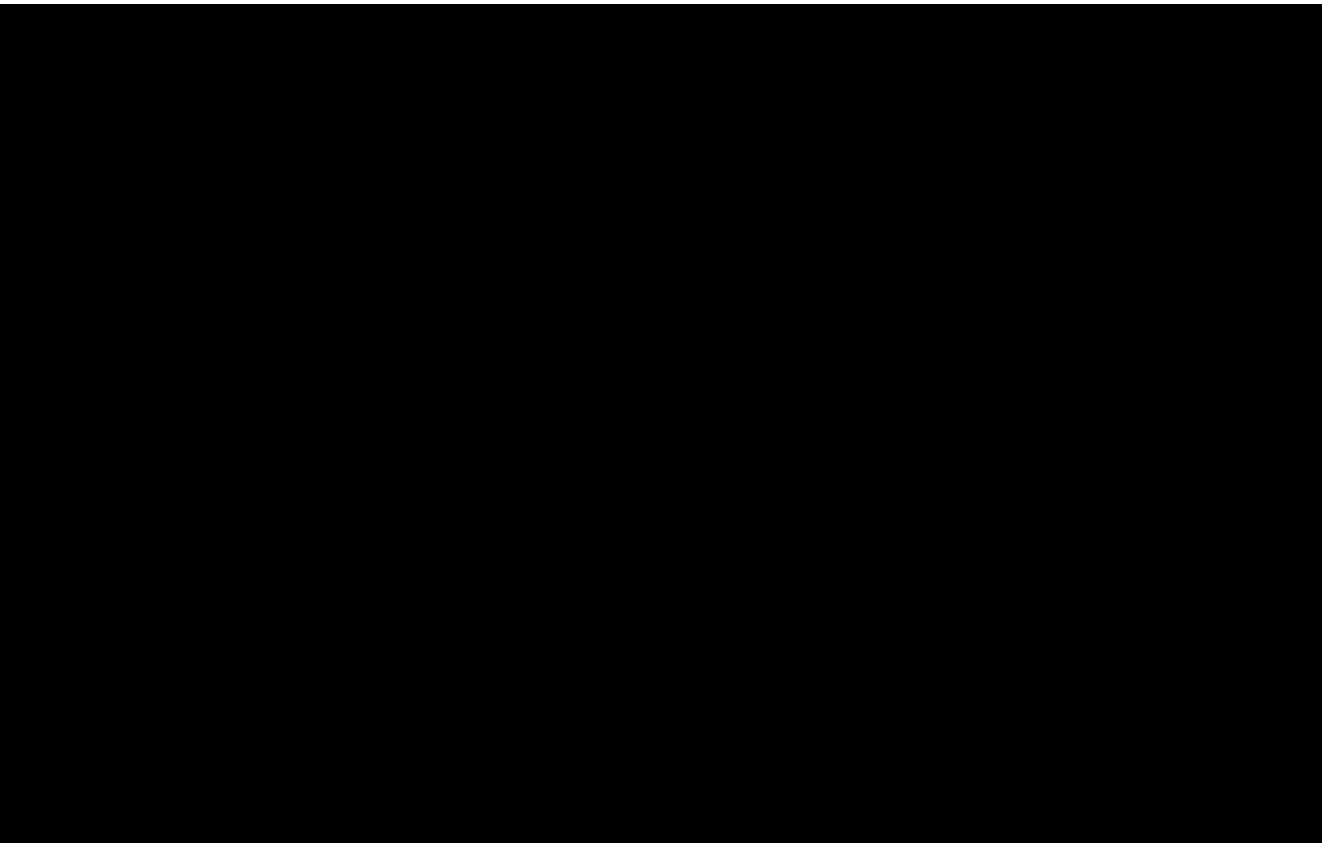
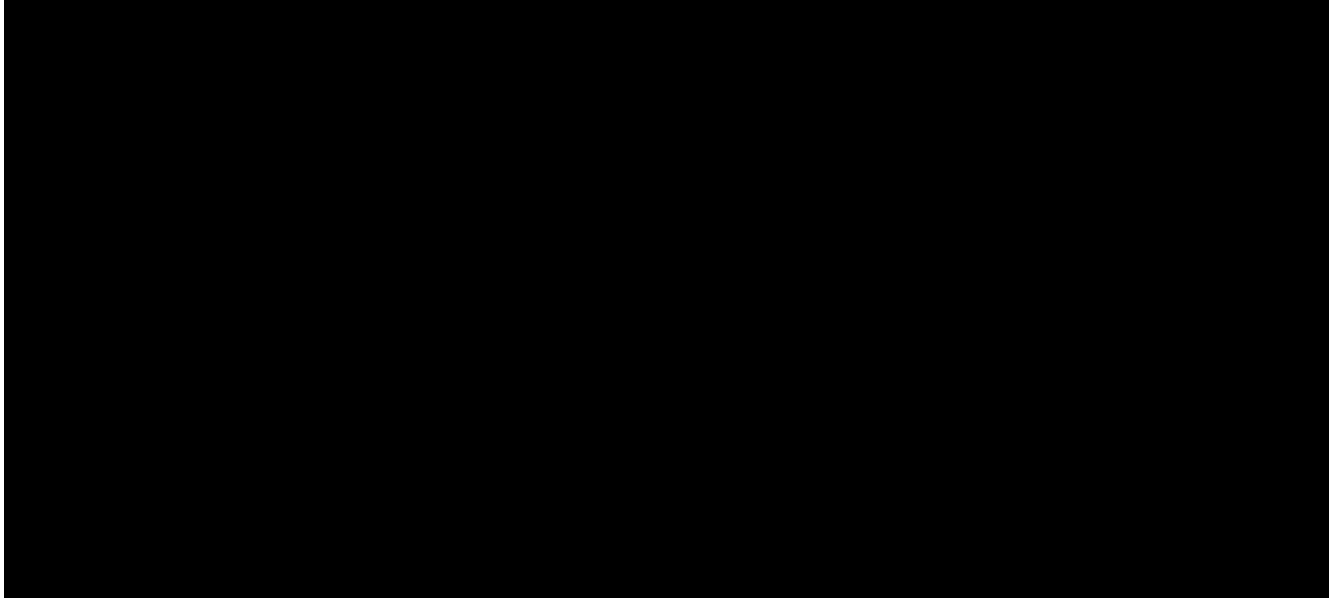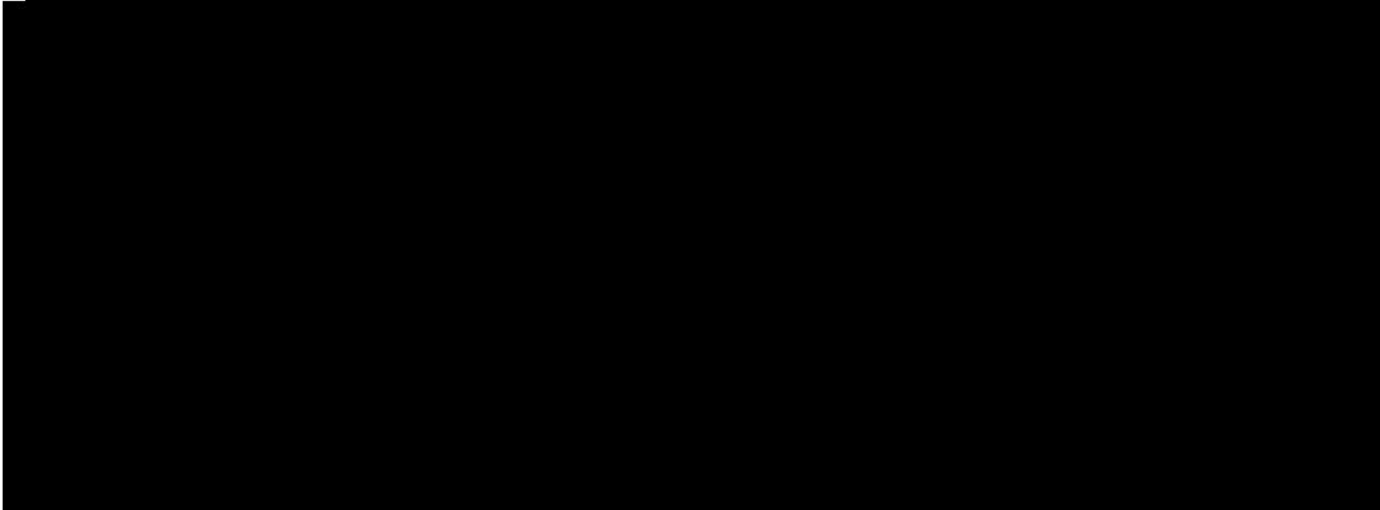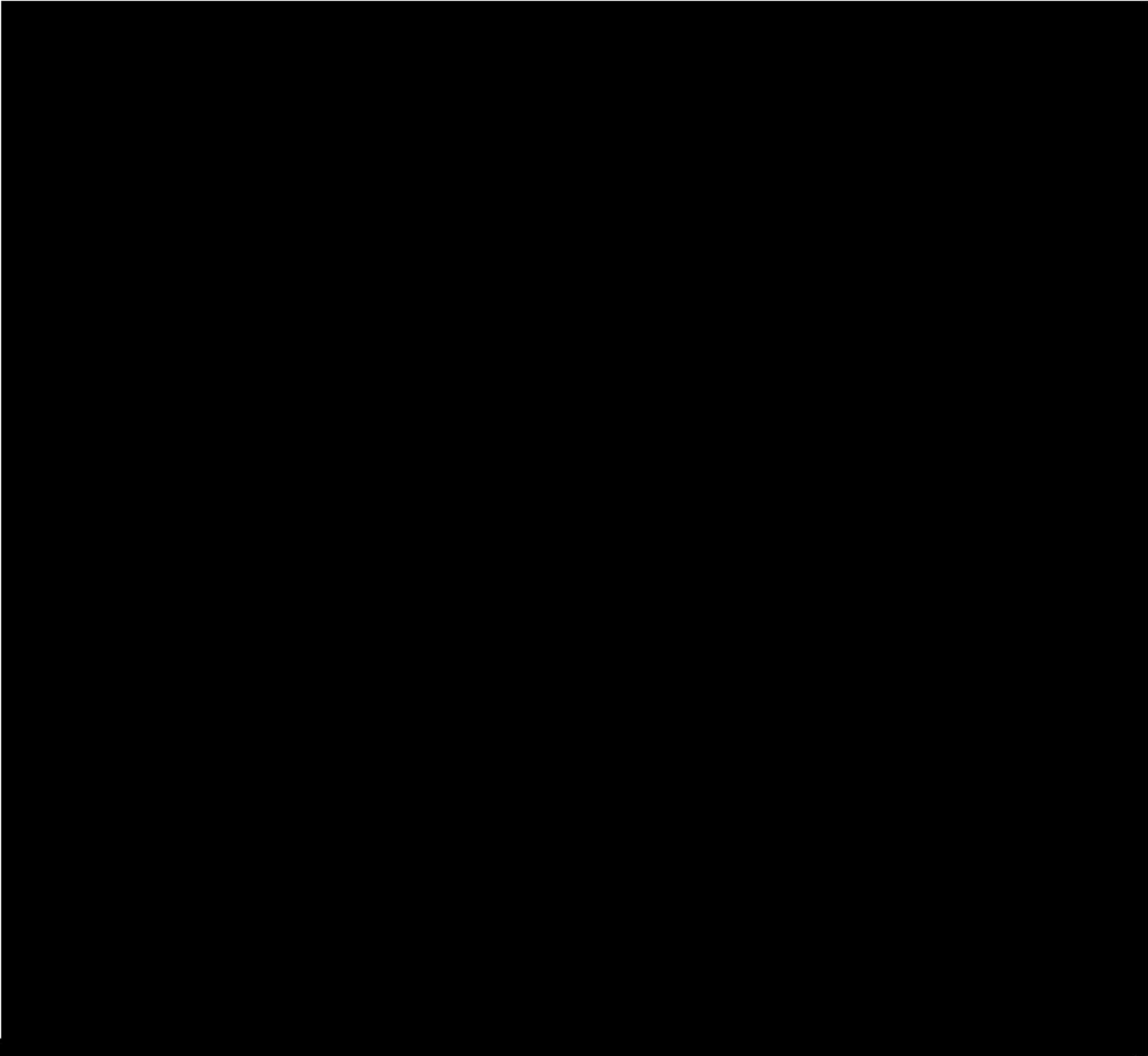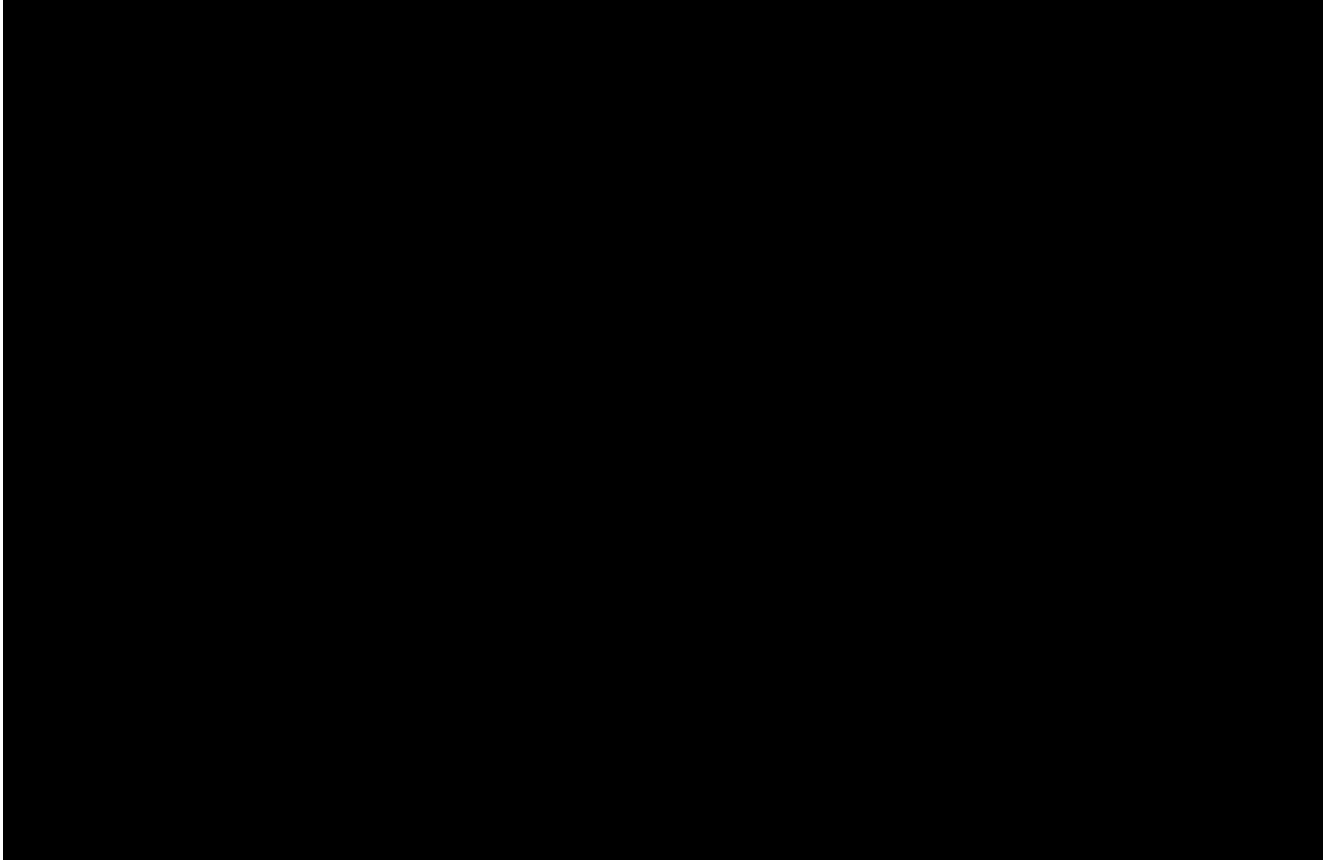**Client Management Information System Implementation and Support Services**

Requirements for Implementation Services [335 points, 20 pages]:

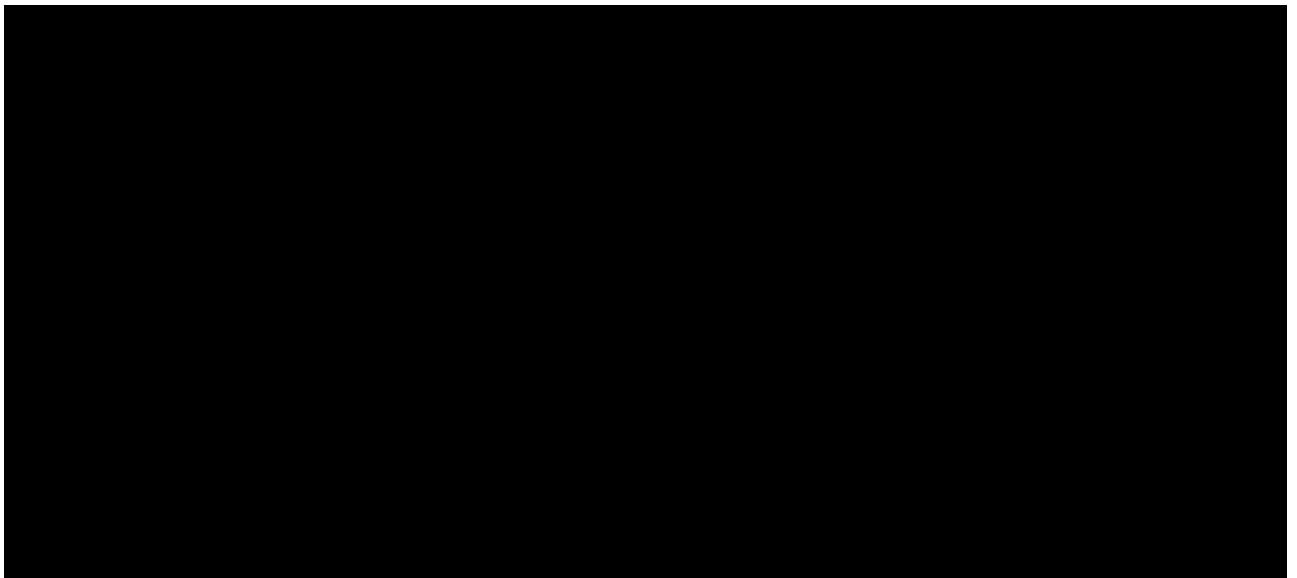Business Process and Functional Design [105 points]

1. *Describe your plan for performing Solution requirements elicitation and analysis, design, development, testing, hosting and implementation tasks to maximize adoption by end users.*
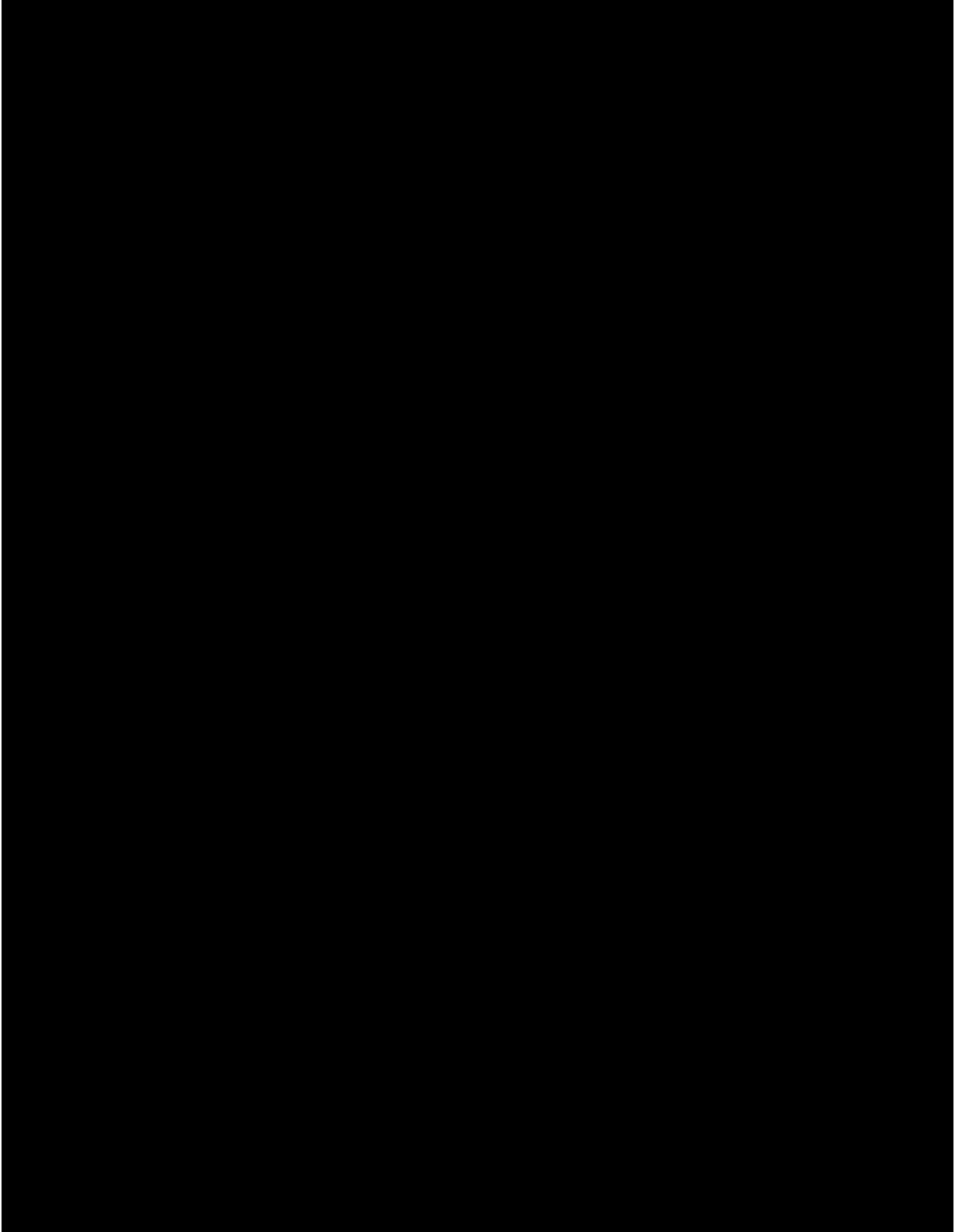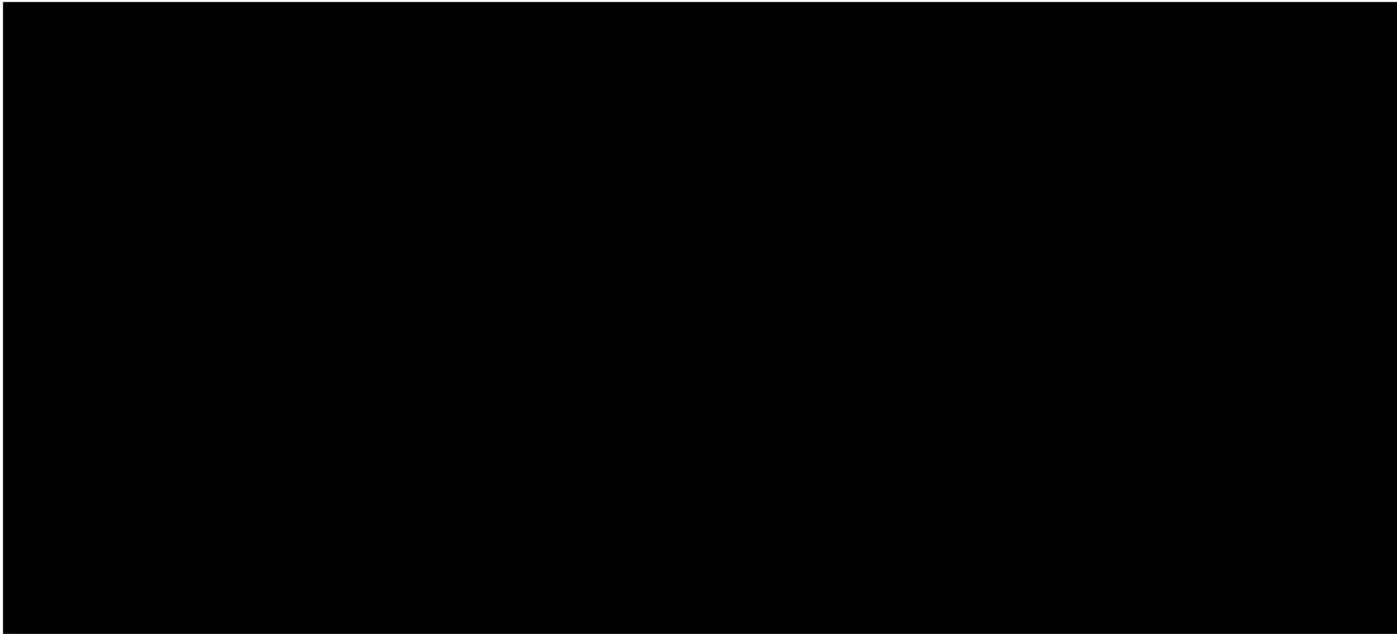
CoreSphere utilizes the following best practices for Lightning and code development.

2. *Describe the established approaches you have used to assist other clients with assessing the best way to implement, measure, manage changes to and achieve business objectives via the proposed solution.*

3. *Describe your capacity and capability to provide a solution that flexibly supports the Core Features (Referral, Intake, etc.).*

CoreSphere has assessed DHS requirements, available solution options and has determined that the best approach for DHS is to configure the Salesforce platform to meet its needs Vlocity in addition to Salesforce to meet DHS requirements Vlocity provides valuable functionality available in

For this reason, CoreSphere proposes using its prior knowledge of DHS programs, Salesforce configuration expertise, and a partnering mindset to propose a solution built on the Salesforce Platform

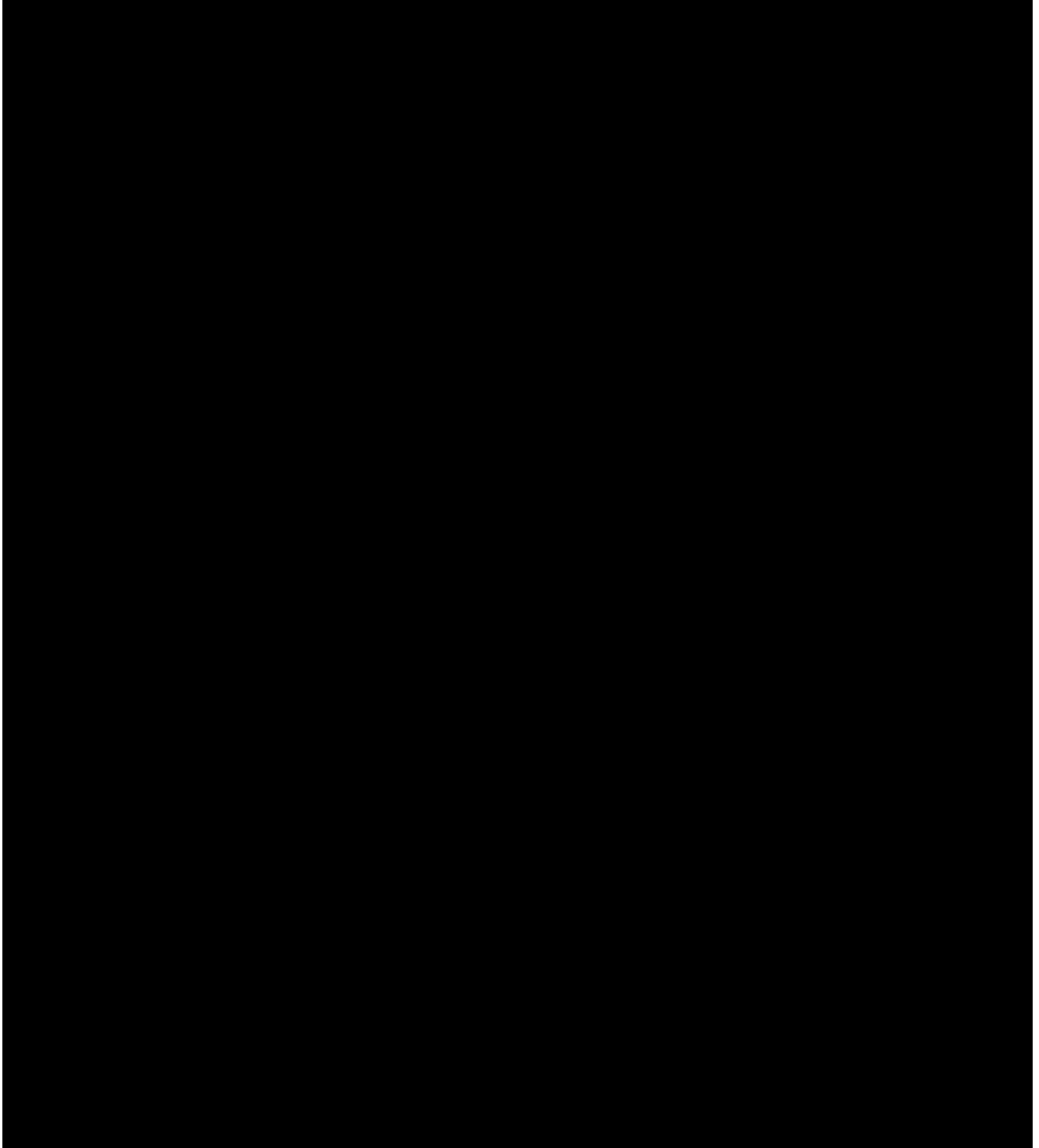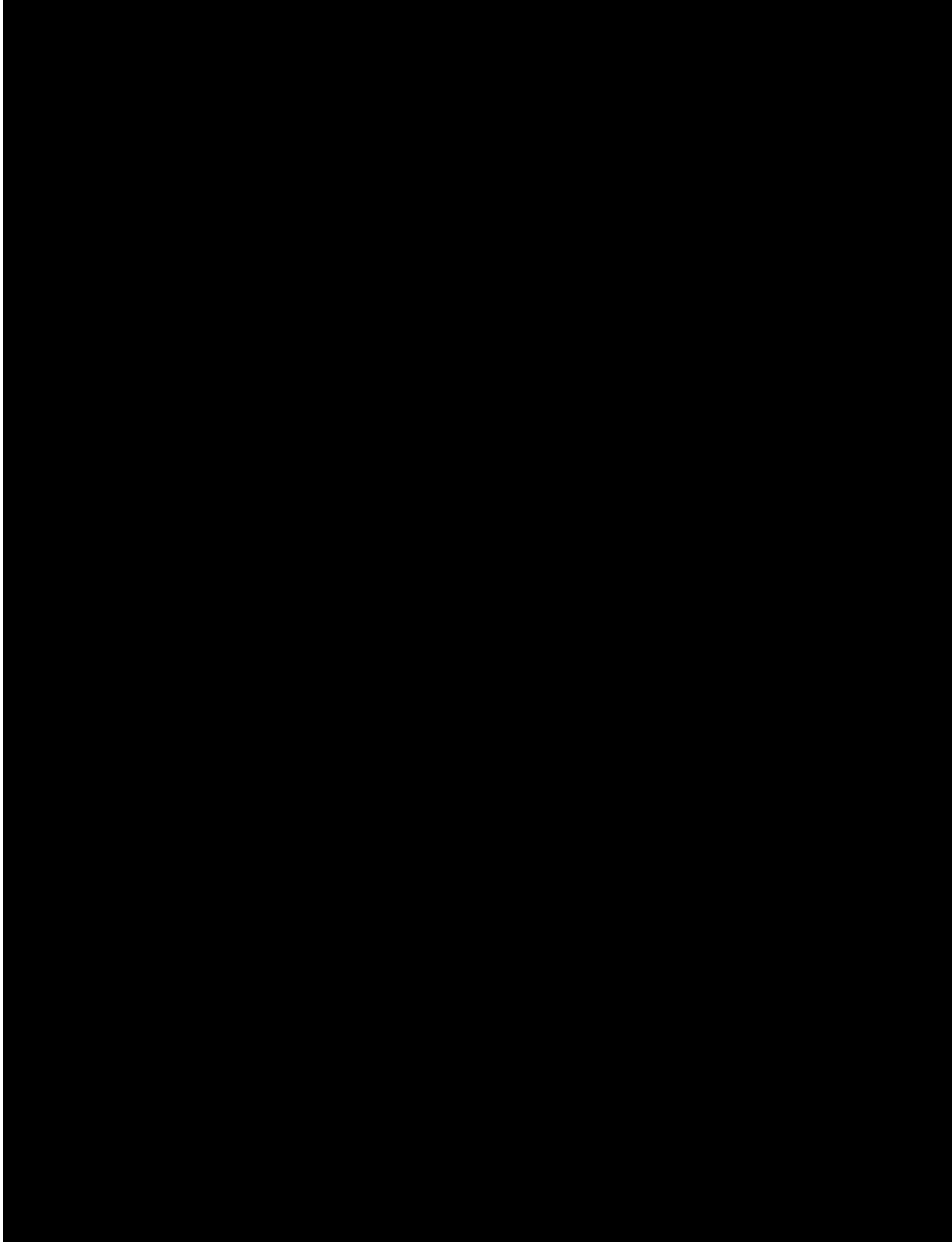**3.1 General Functional Requirements (Req # 4.1 A through 4.1 F)**
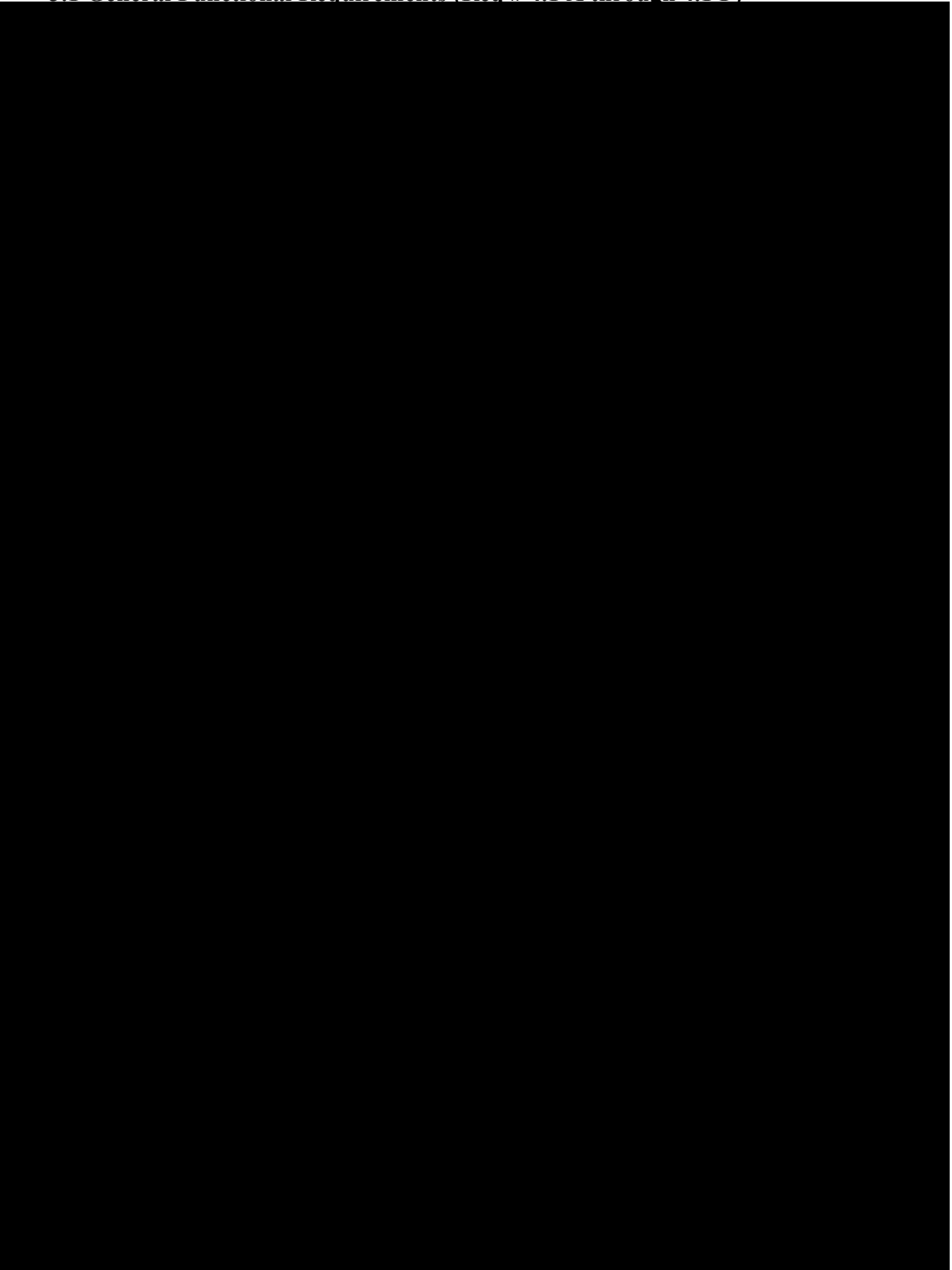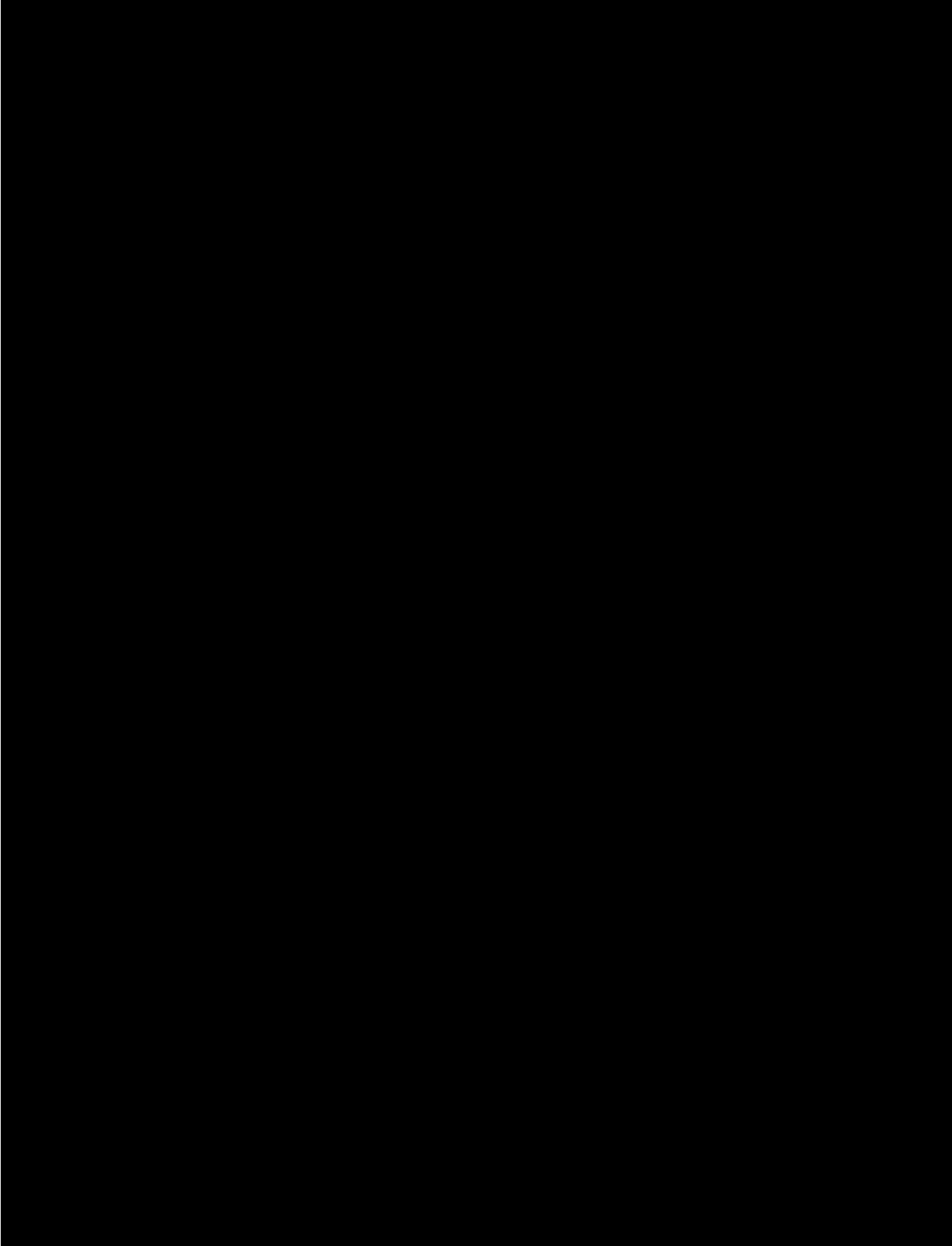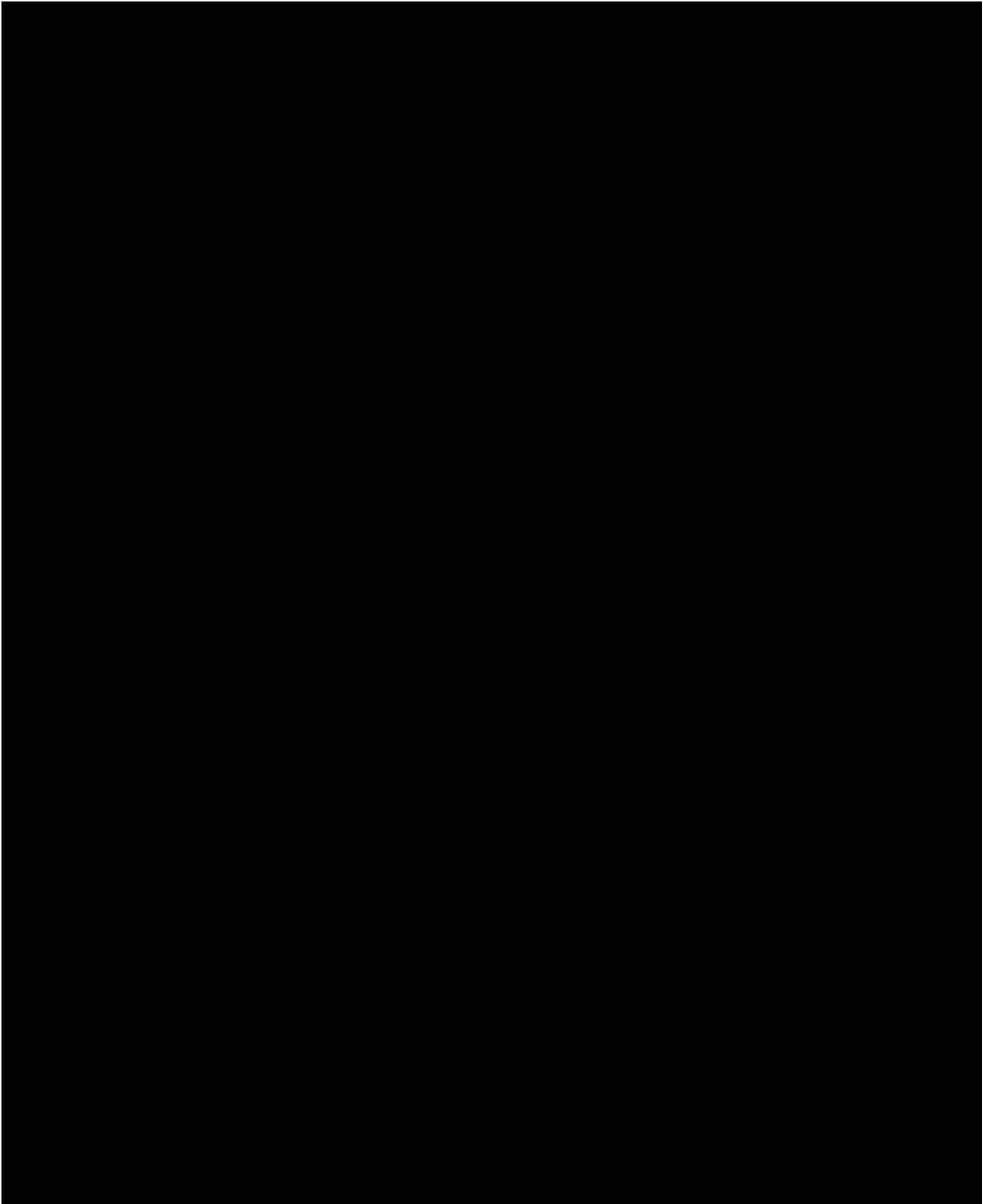
4. *Describe your capacity and capability to provide a solution that flexibly supports the Supporting Features (Provider/Facility Management, Forms & Reporting, etc.).*

CoreSphere will configure all necessary supporting features using standard Salesforce features and configuration best practices. We have routinely completed similar functionality and configuration for our numerous implementations.
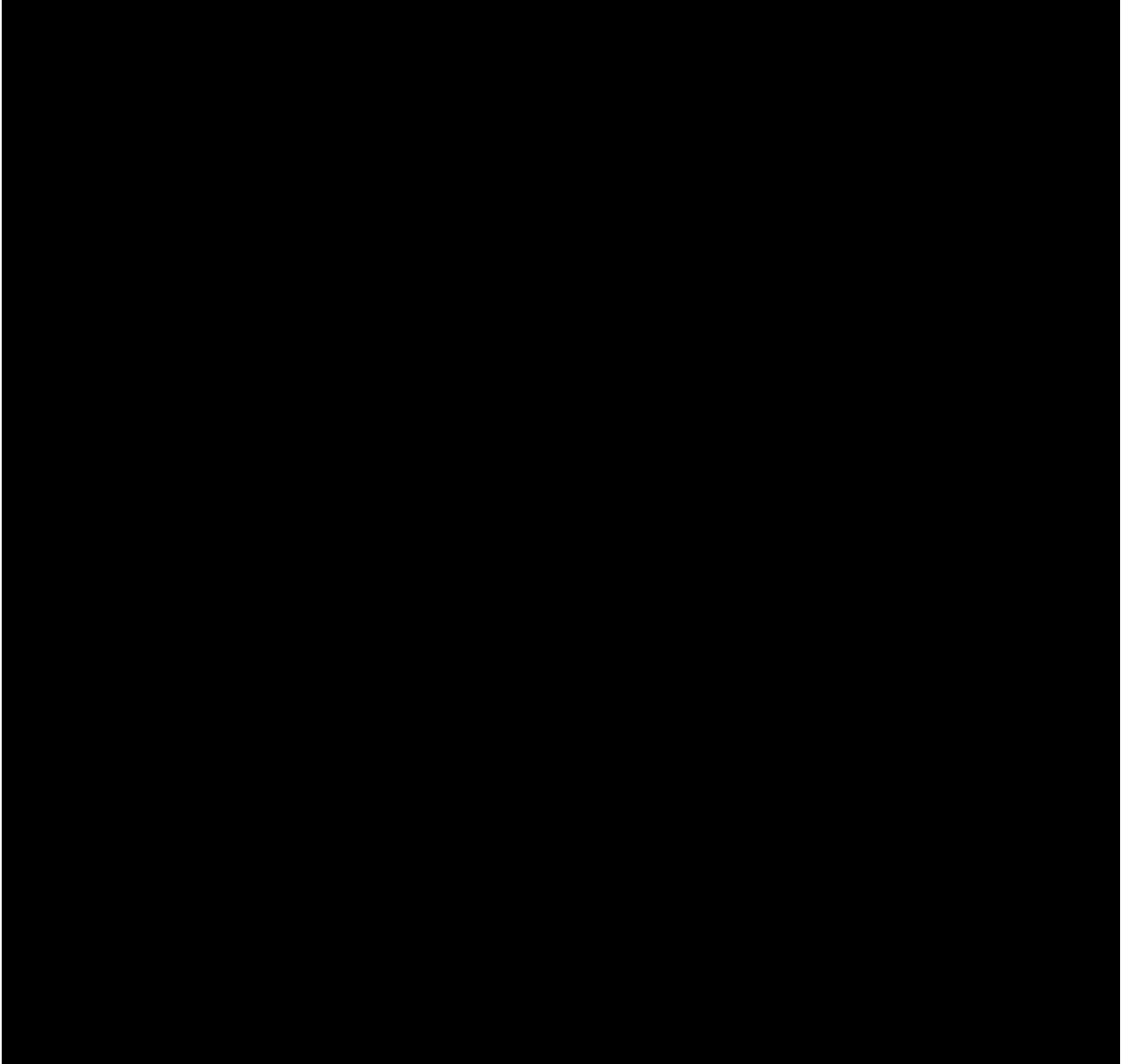
separated value data if desired. A process can also be developed using Salesforce Data Loader to export the necessary data based on a defined criterion.

5. *Describe how you can offer guidance on governance and delivery methodologies to empower DHS to achieve transparency and flexibility in changes to the proposed Solution.*

6. *Describe how you will partner with DHS and the Architecture Support vendor to assist in governing how the proposed Solution will be managed across the various use cases and stakeholders, in a way that retains the proposed Solution's value.*

CoreSphere will partner with DHS and the Architecture Support Vendor by open collaboration and sharing of knowledge so that CMIS can be delivered successfully. There are numerous projects such as HUD and FDA where CoreSphere has provided

both the Implementation Services and Governance support. When we have provided such services, we utilize a separate firewalled team to ensure independence and objectivity. We are fully knowledgeable in the Governance processes and understand its need and importance. This knowledge gives the CoreSphere team the necessary appreciation and insight to work with the DHS selected Architecture Support vendor. At the beginning of the project we will initiate several critical activities in conjunction with the Architecture Support vendor so that all parties are aligned. Some of these will include:

- Schedule – review and align schedules such that the Architecture Support vendors schedule is in alignment with the Implementation schedule and milestones
- Processes – review and develop a common understanding of each party's proposed methodology and processes so that a common understanding and alignment can be reached on day to day activities and cadence for collaboration
- Best Practices – share best practices to ensure that the Architecture Support vendor understands the salesforce platform, the best practices that CoreSphere follows, and reach a common understanding on the best practices that will be utilized on the project
- Reviews - collaborate and finalize any formal Reviews that will be conducted, what the expected documentation requirements are for the Reviews, the agreed upon schedule, as well as agreed upon standards

Technical Architecture and Design [175 points]

1. *Describe how you will provide effective consultation and project management support services throughout the Solution's implementation lifecycle.*
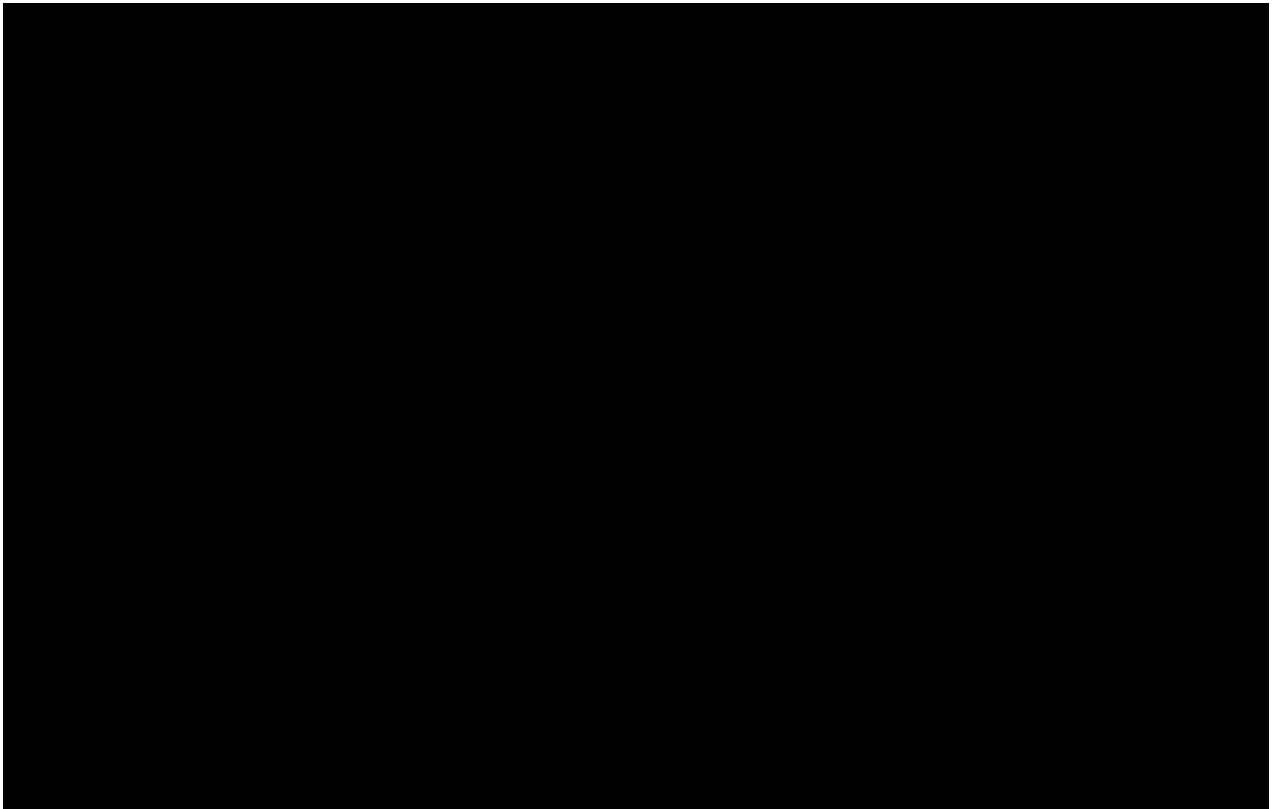
2. *Describe your plan for periodically evaluating process management approaches and recommendations for implementing flexible, adaptive and iterative approaches to development.*

One of the most valuable facets of using an Agile approach during a Salesforce implementation is the ability to constantly evaluate new facets of the functionality provided out of the box by Salesforce against evolving business process challenges. Our team is well versed in how Salesforce deploys features and functions and how to meld those with customer requirements within a project as Salesforce evolves (via 3 Seasonal releases per calendar year).

By utilizing sprint demos, sprint retrospectives, sprint velocity measurements over time and feedback directly from business users, we will incorporate improvements on an ongoing basis through the life of the project and into maintenance. Improvements using this method will positively affect User Story Sizing, Acceptance Criteria, DevOps, and improved Sprint Planning as the project progresses. Process management and process governance are key to any successful Salesforce implementation. Within CoreSphere's internal TMO, we will establish a dedicated CMIS Technical Review Board (TRB) to define and communicate a shared technical and architectural vision, and to help ensure the CMIS solution under development at any given point in time is fit for the current (and future) business needs of the DHS program.
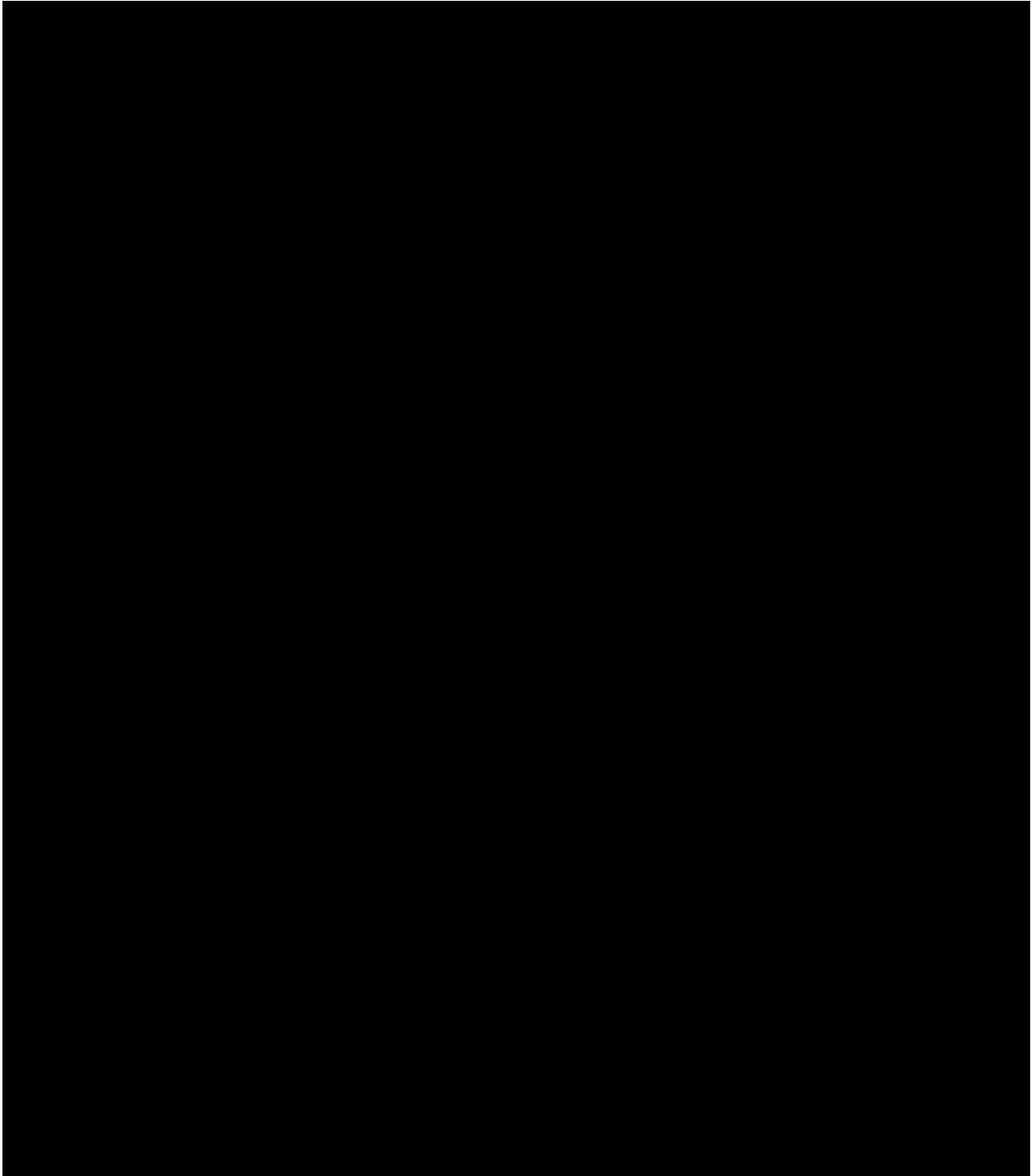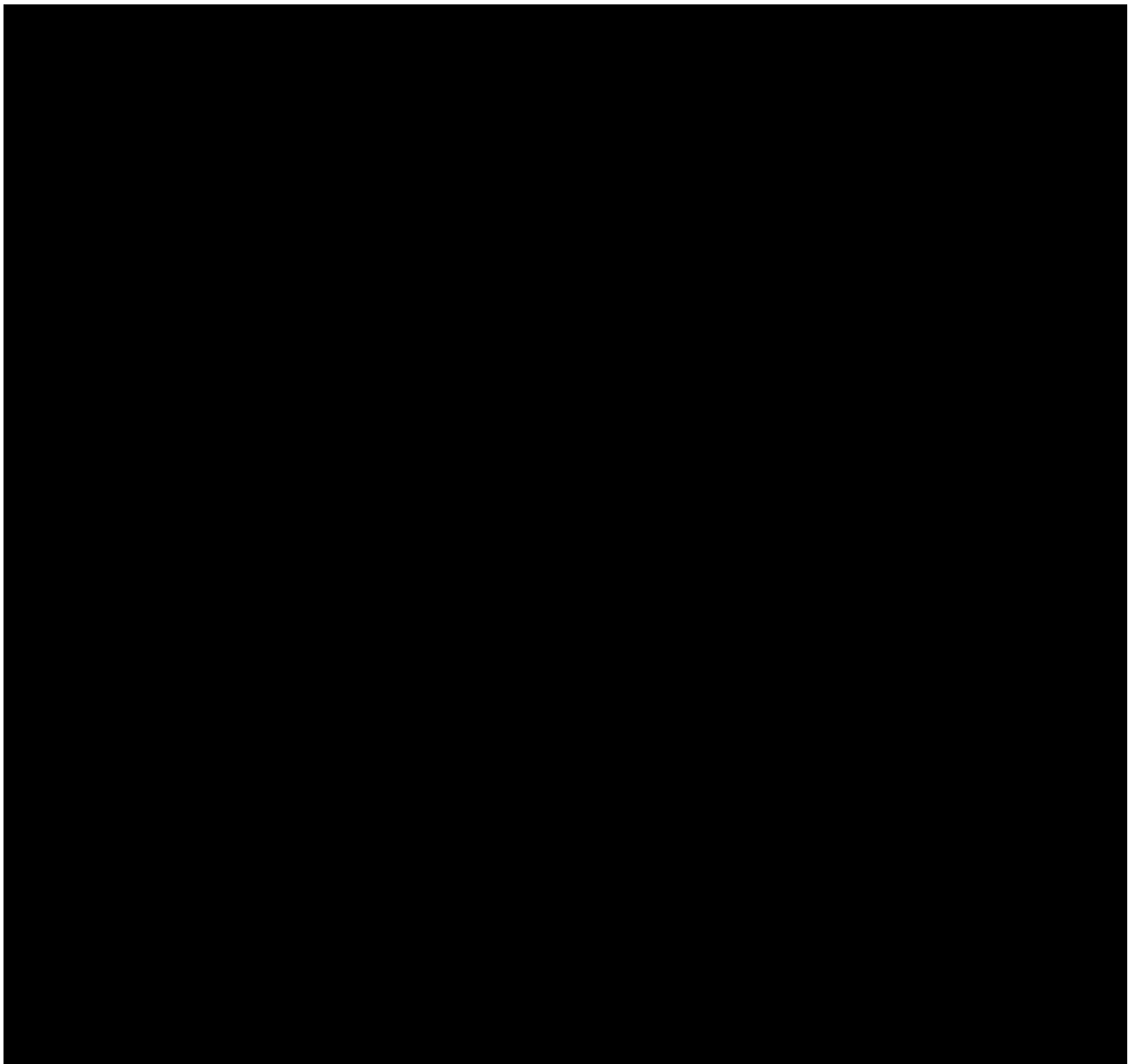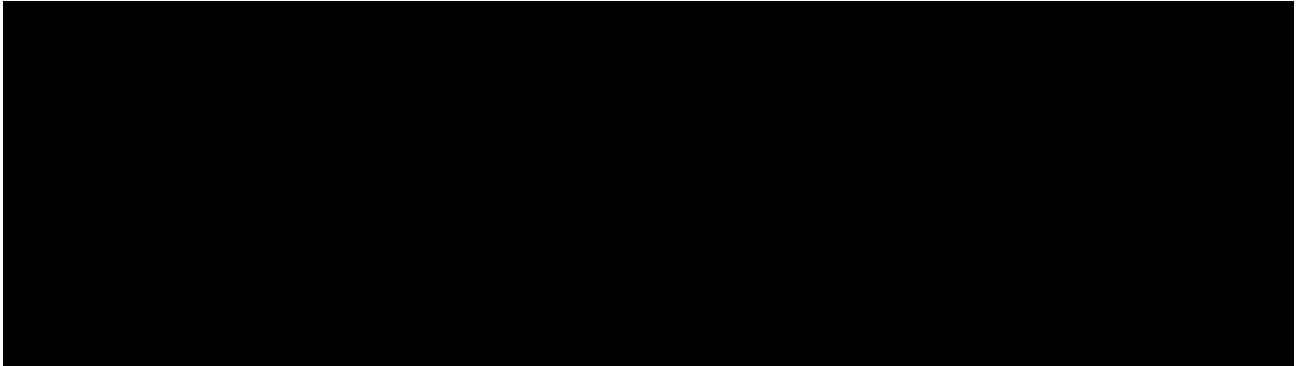
3. *Describe how the proposed Solution offers a high level of interoperability and integration, including the ability to integrate with MCI and MPER.*

CoreSphere is proposing to utilize the native Salesforce APIs to integrate Salesforce-based CMIS solution with existing DHS applications such as MCI and MPER. Salesforce offers robust integration features including Web Services support (i.e., APIs, outbound workflow) and import/export utilities or utilize ETL tool such IBM Data Stage to
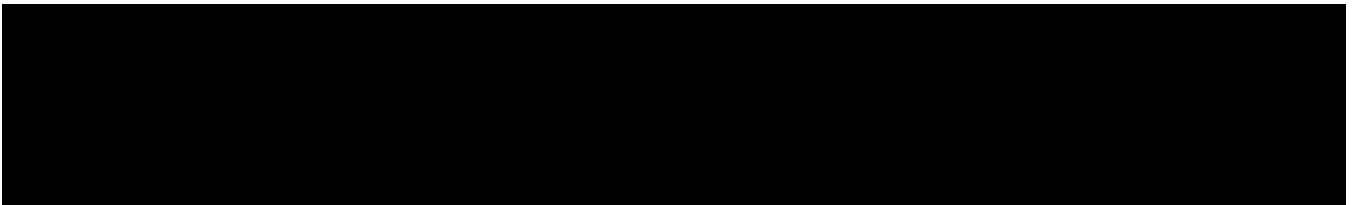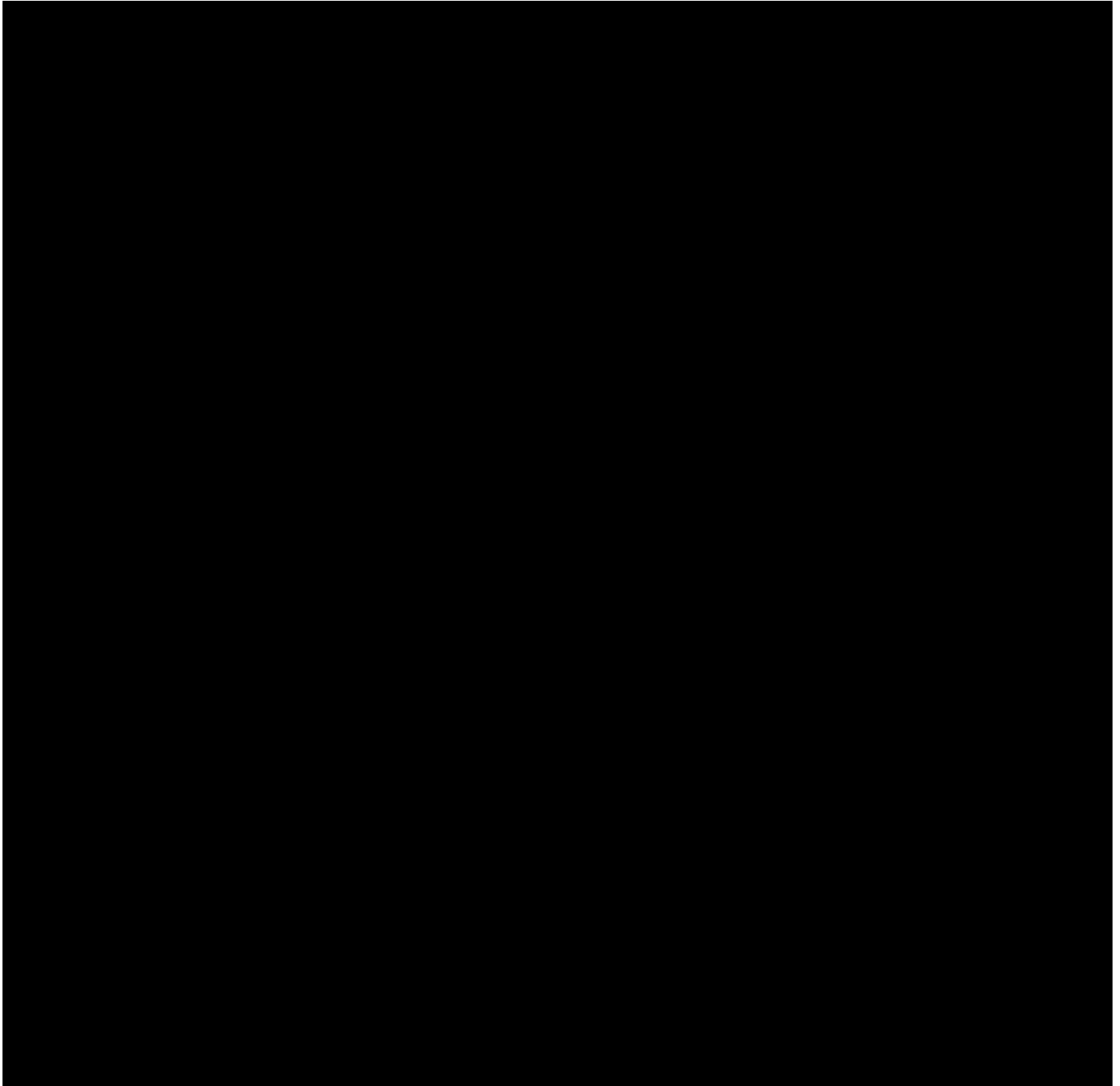
integrate using the SOAP API. Additionally, we may propose integration approach based on middleware tools such as MuleSoft that will require a setting up MuleSoft ESB as a separate initiative for DHS.
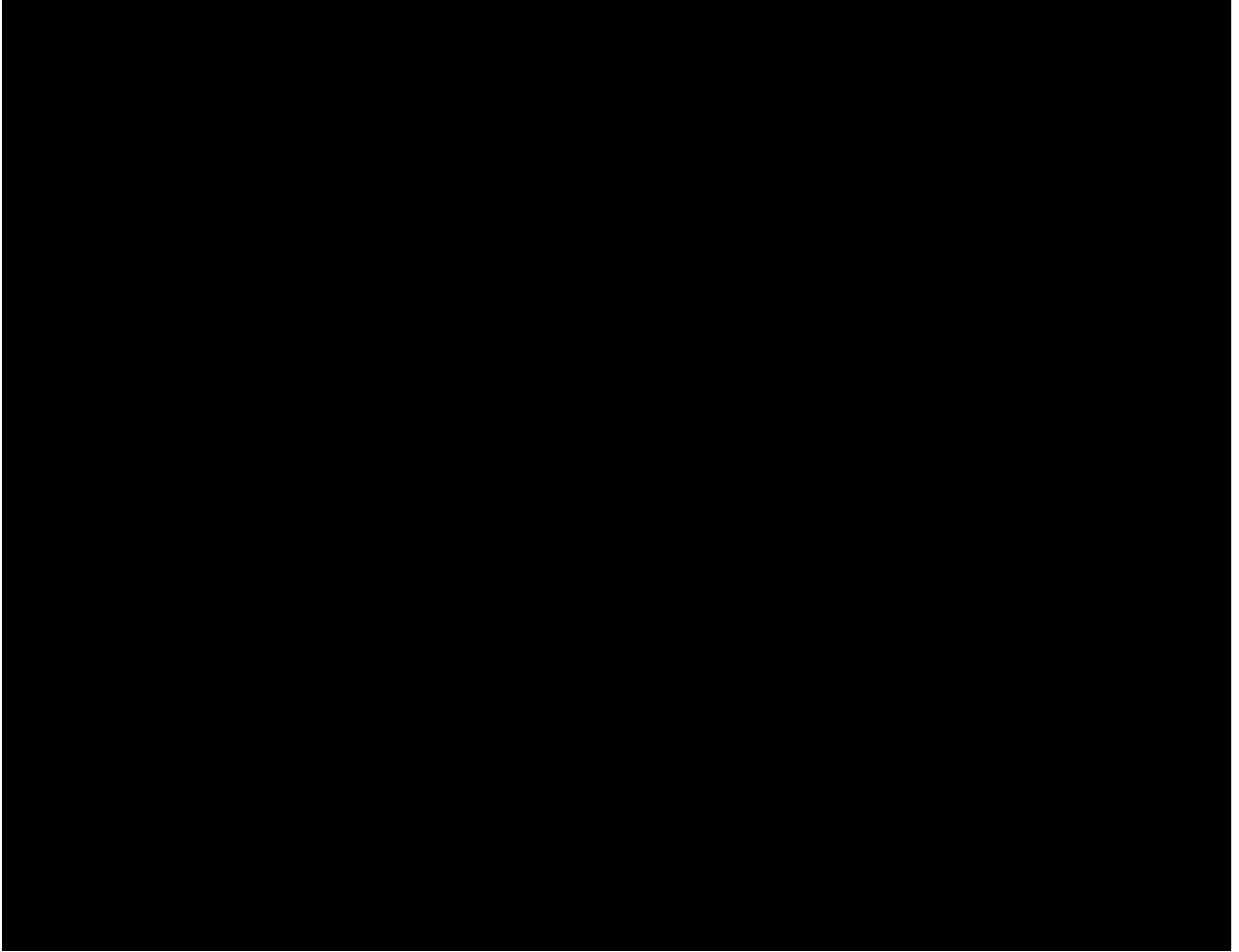
4. *Describe the ways in which DHS can have unfettered access to data entered into the proposed Solution.*

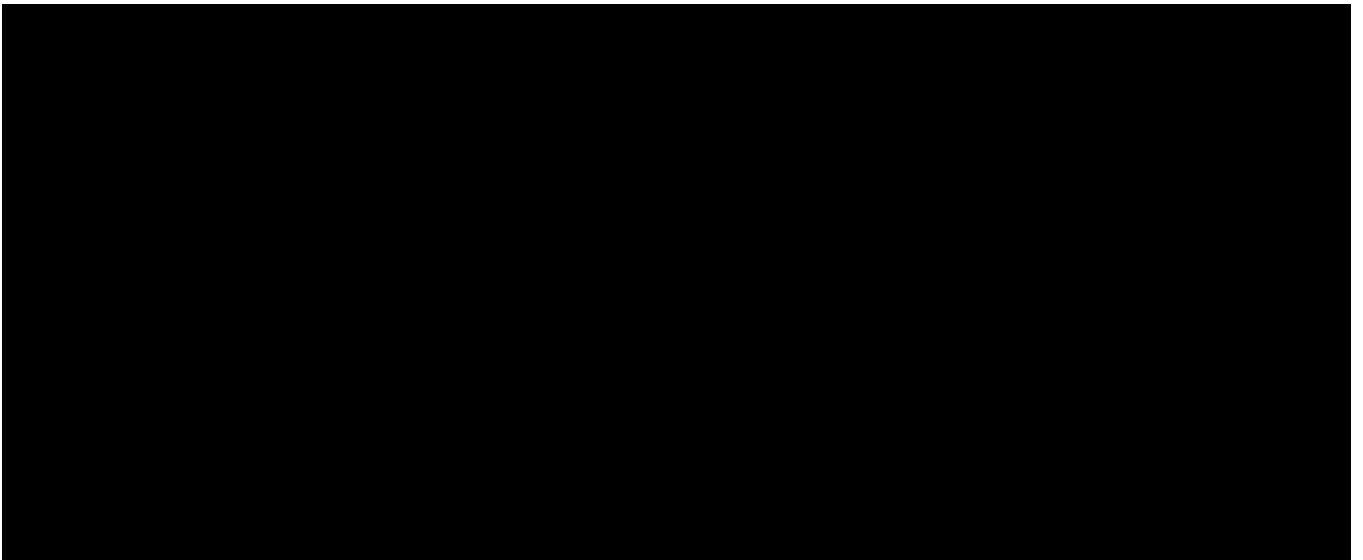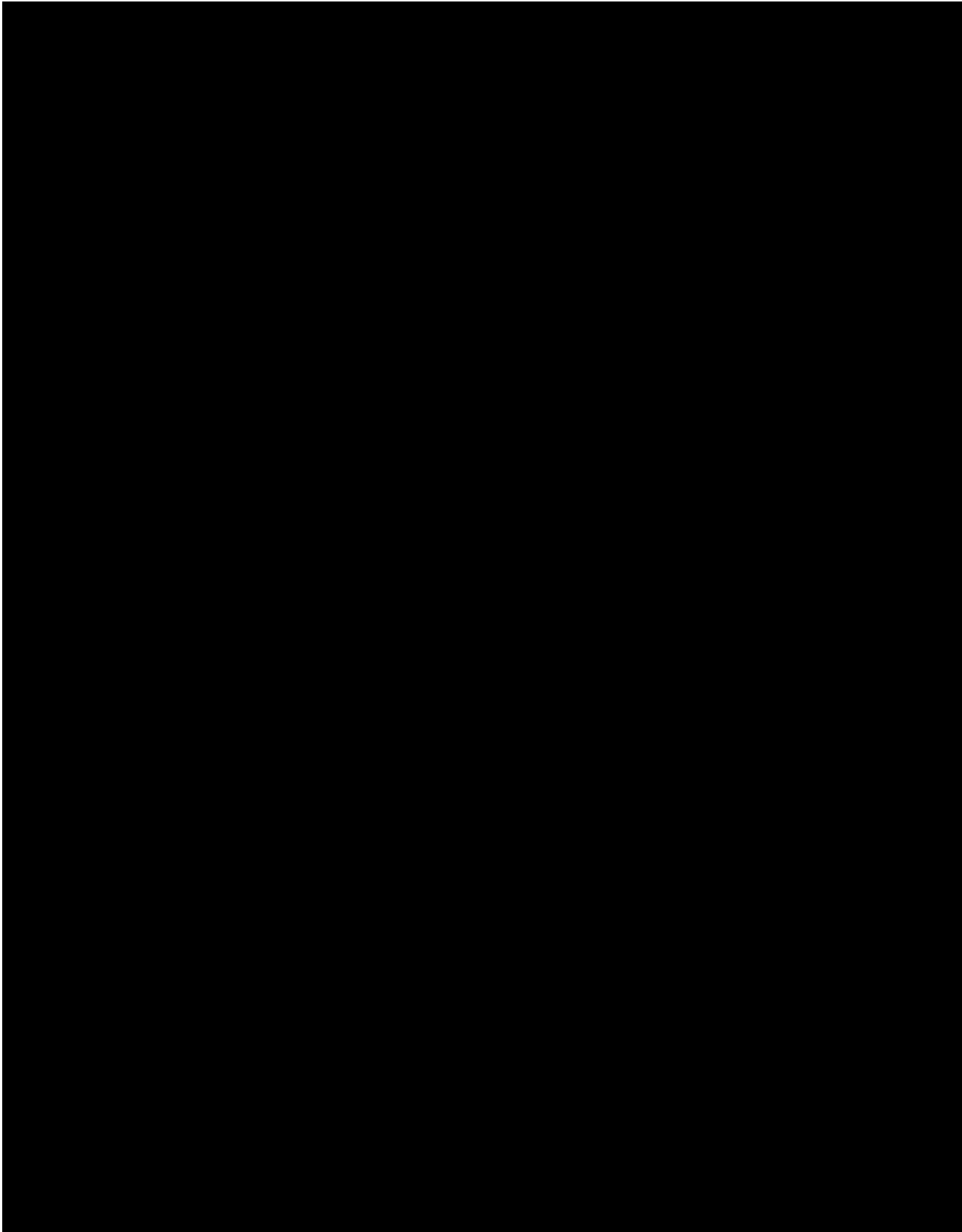5. *Describe how you will work with DHS during development to promote configuration and administration maintenance.*

6. *Describe how the proposed Solution assists with preparation of configured ad hoc and scheduled reports and charts/dashboards to conduct data analysis.*
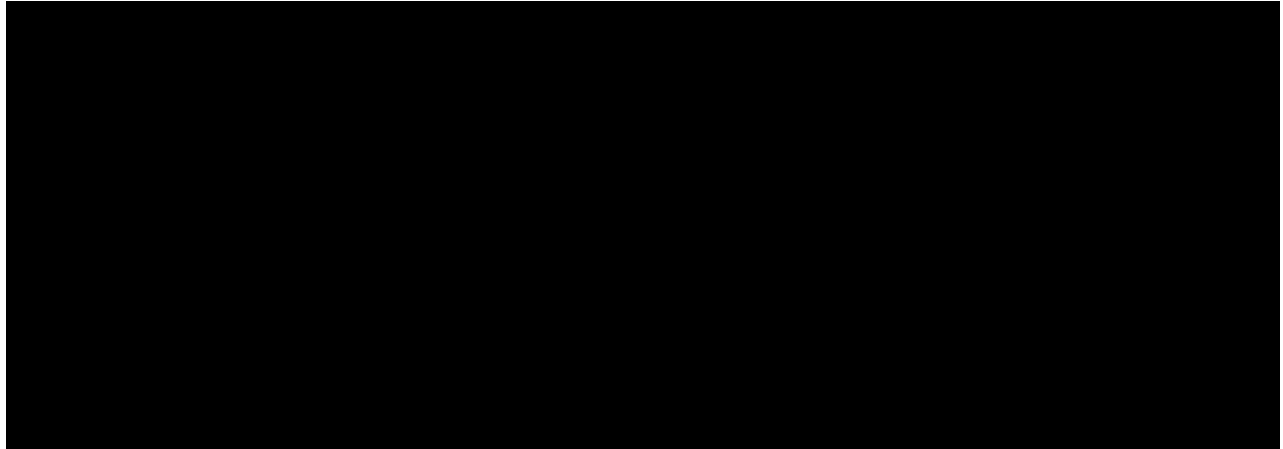
Client Management Information System Implementation and Support Services

<u>Maintenance and Support [25 points]</u>

1. *Describe your process for creating, maintaining and sharing documentation of the*

2. *Describe what support environments will be available to DHS for administrative purposes.*
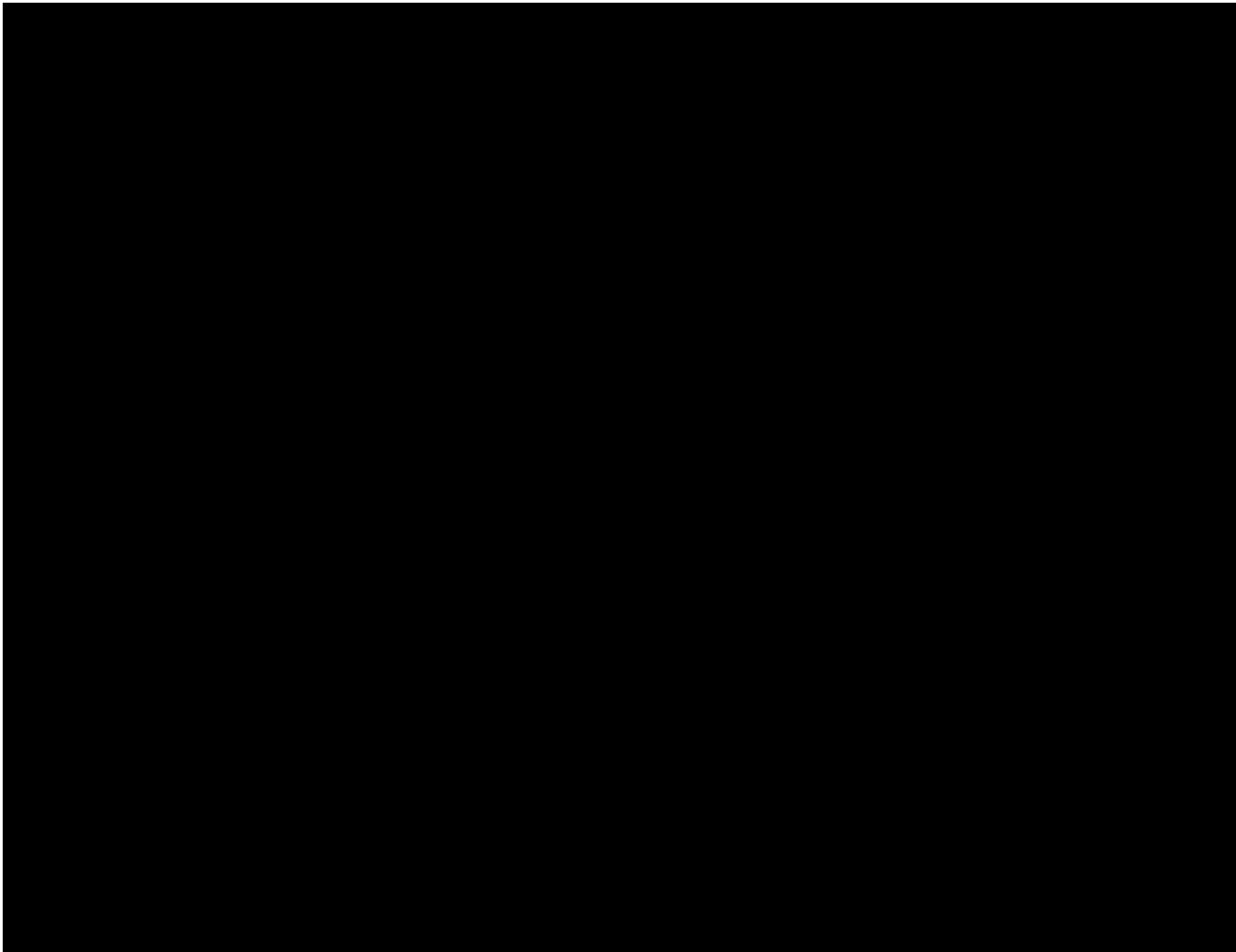
restoration) of configuration metadata, support parallel development and promote patch releases using the defined configuration management approach.

3. *Describe your capability in supporting tight feedback loops between proposed solution changes and positive impacts to end users.*
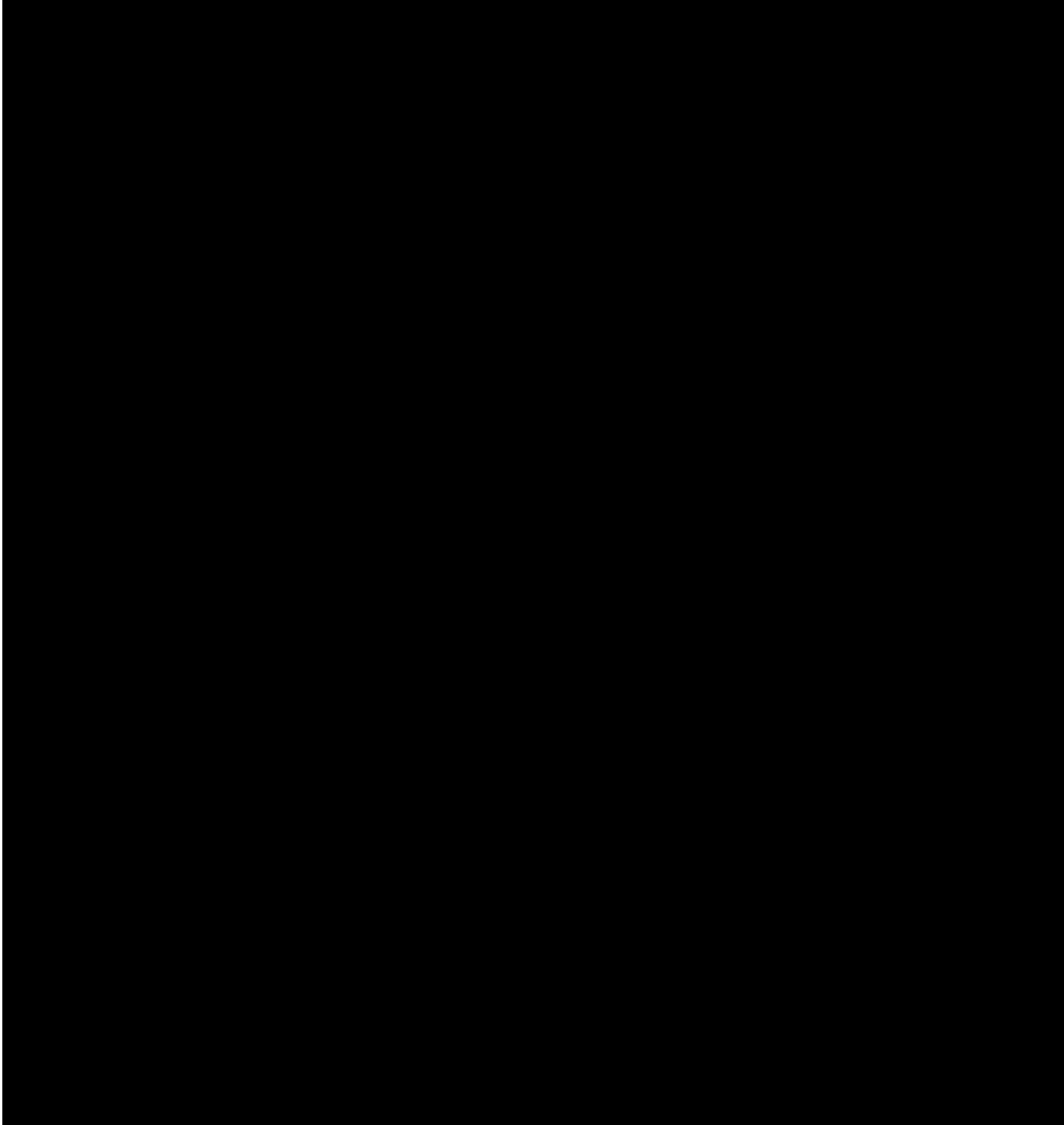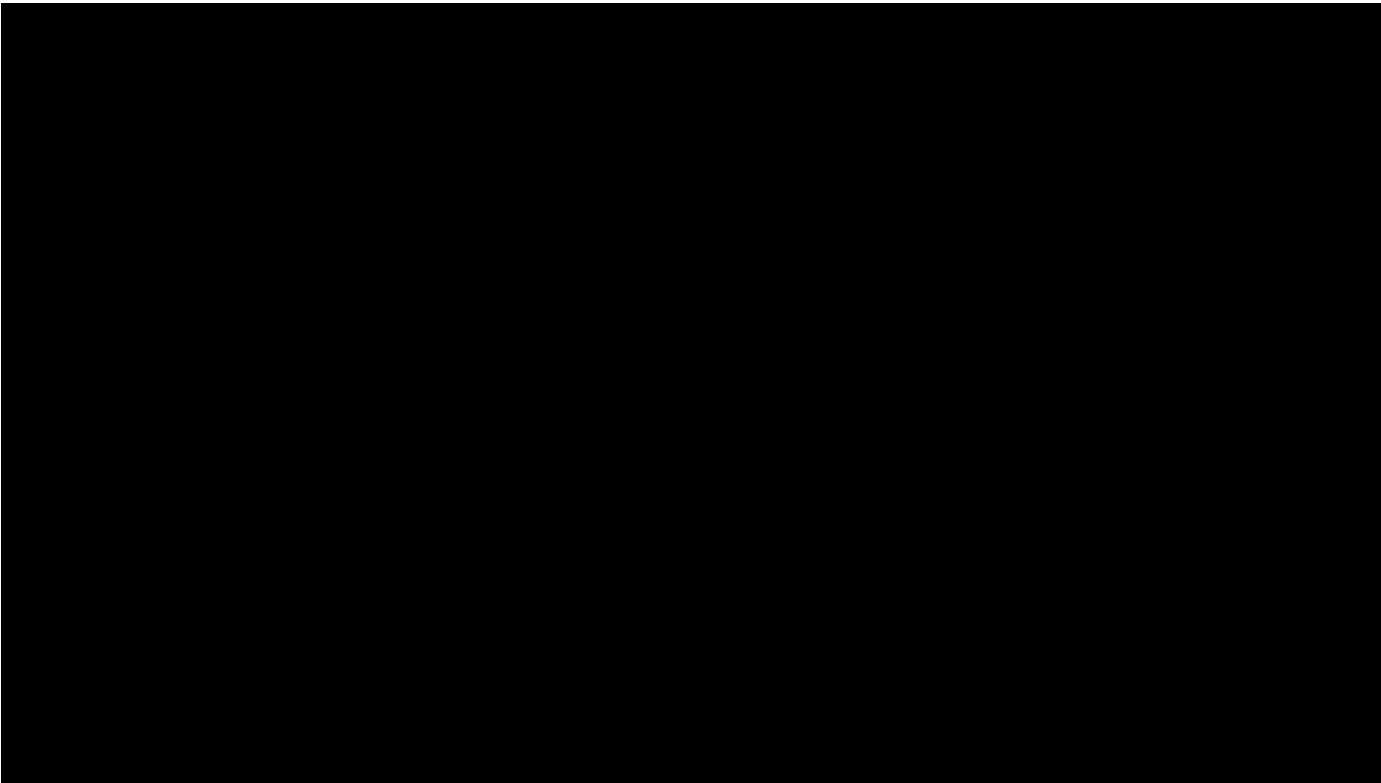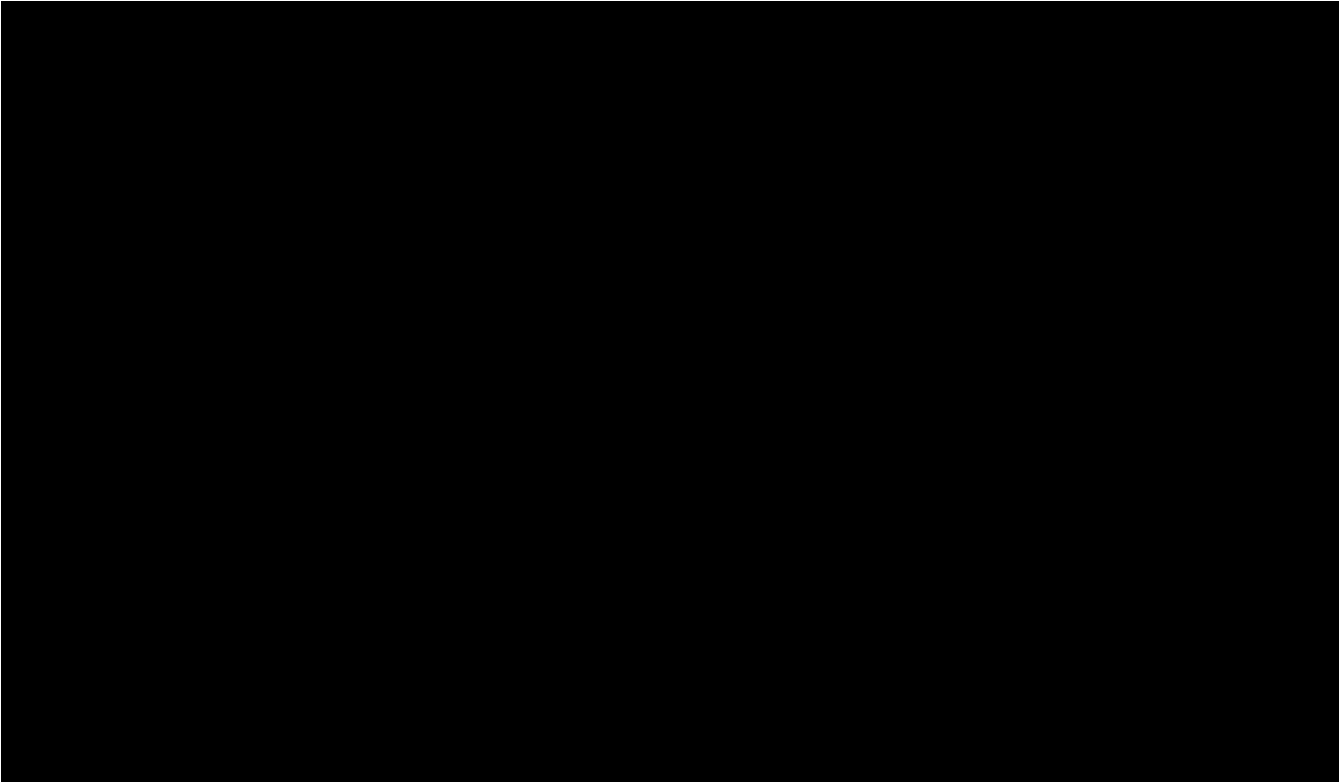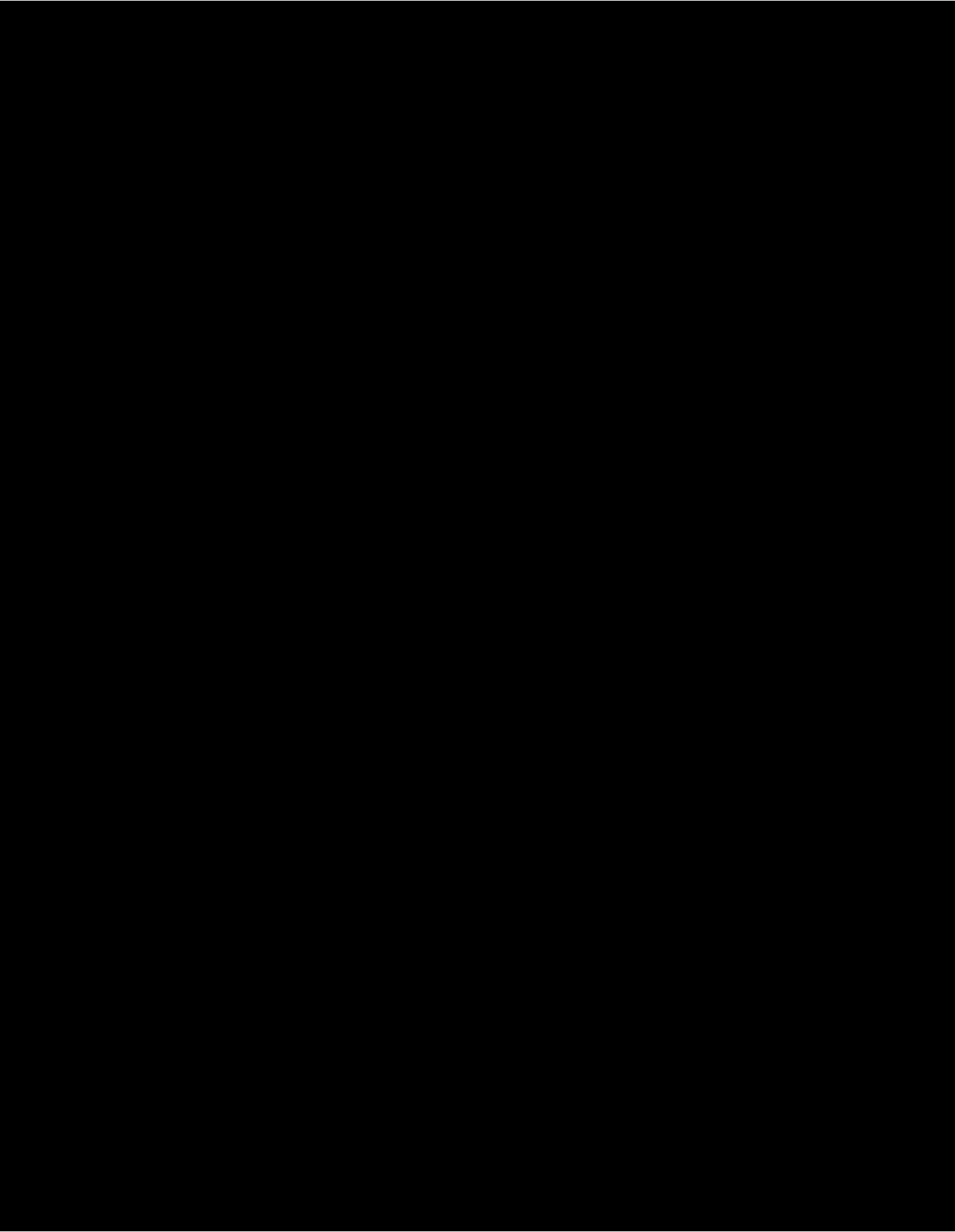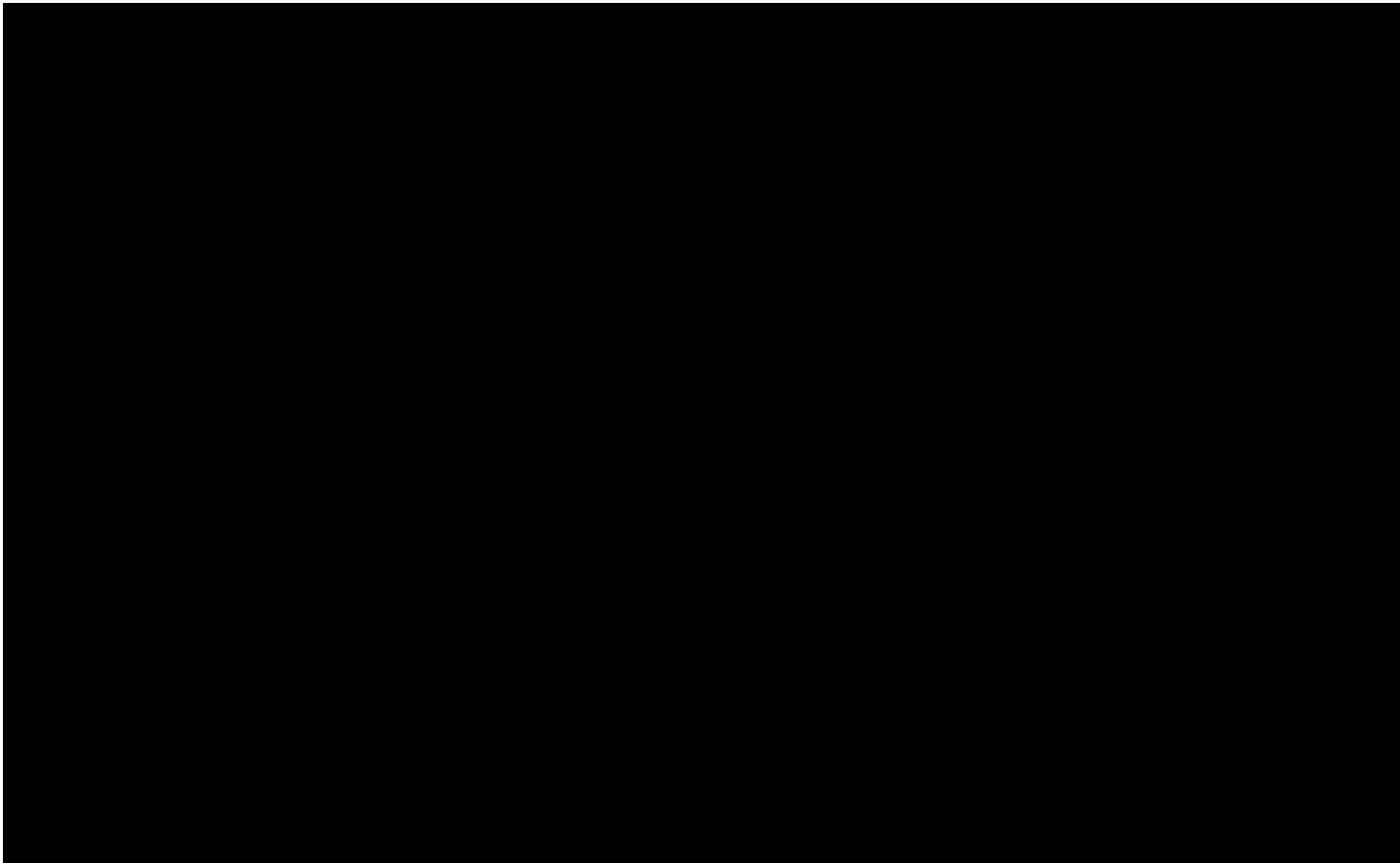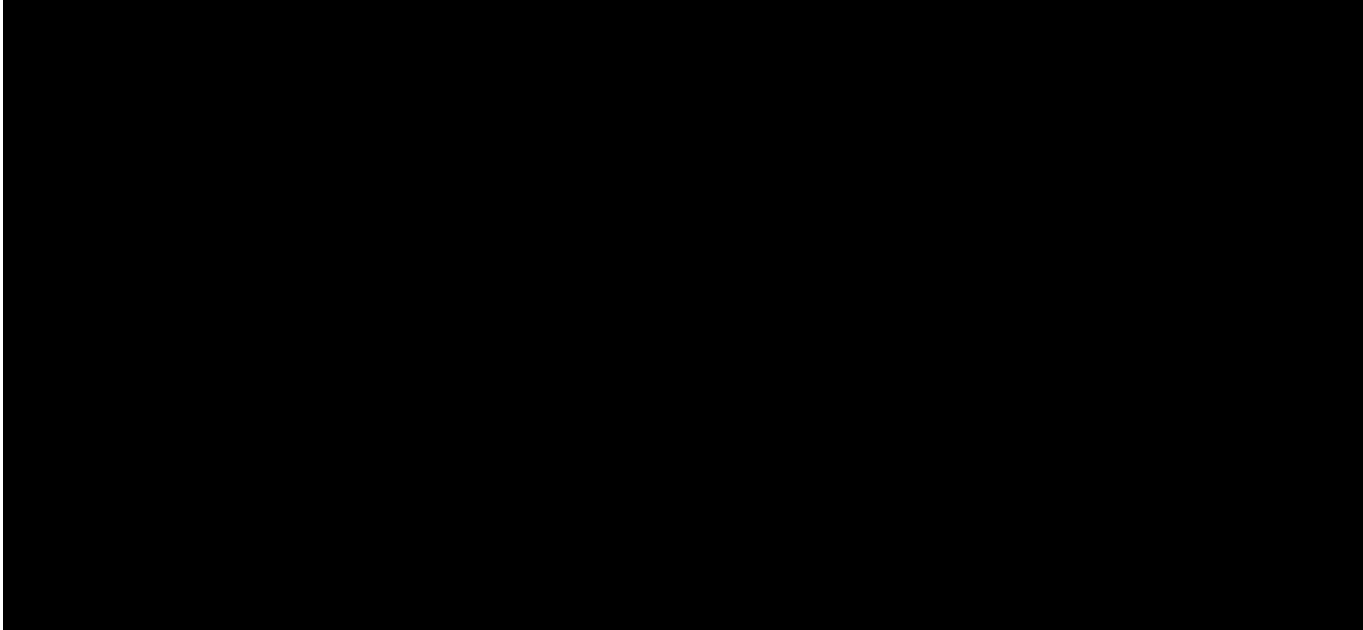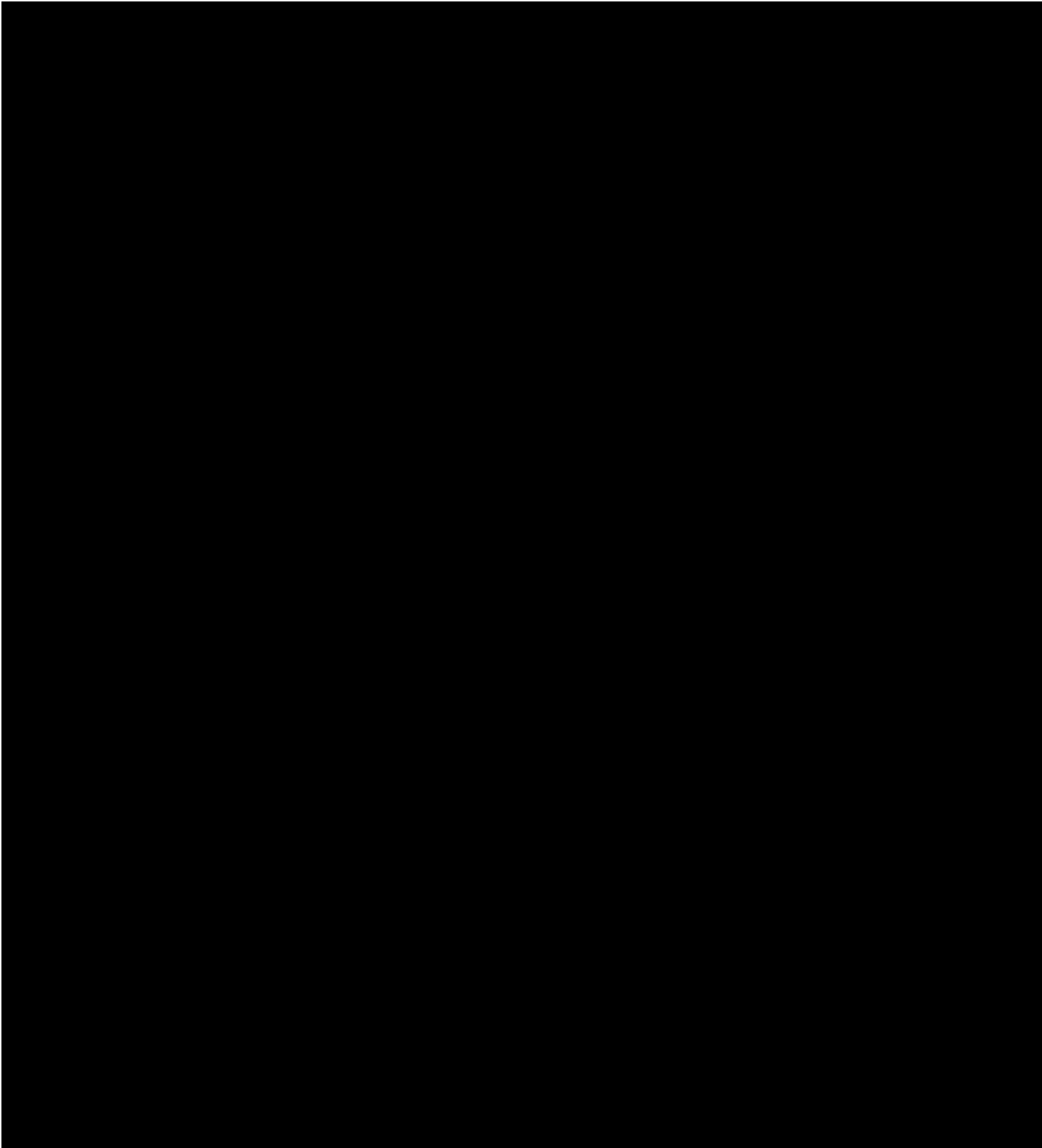
Financial Management and Budget [30 points, not included in page count]

Event Monitoring:
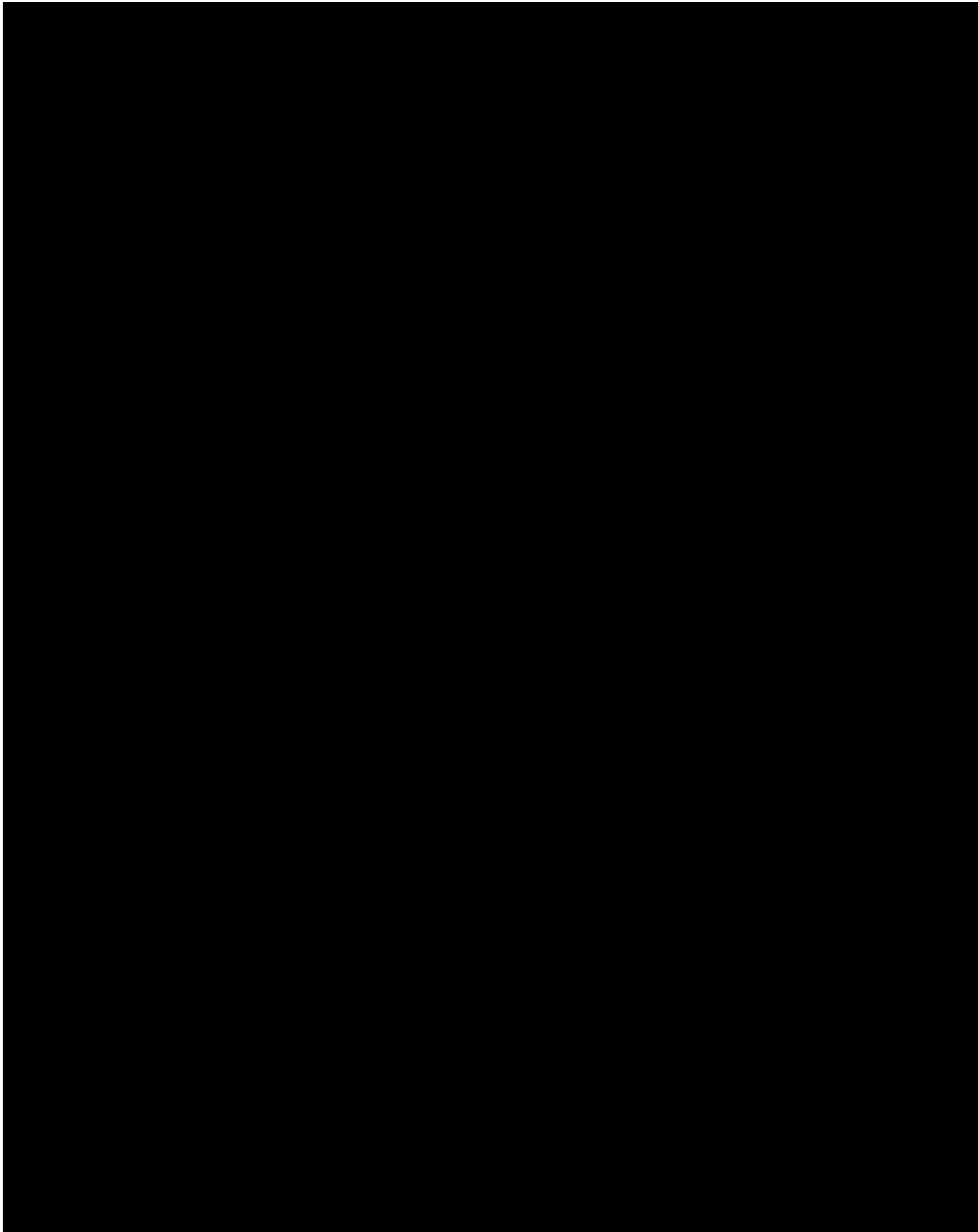
Event Monitoring includes Event Monitoring Wave App, which may not be used to upload or access external data sets other than the one external dataset provided as part of the Event Monitoring Wave App subscription. Customer understands that the foregoing limitation is contractual in nature (i.e. it is not limited as a technical matter in the Services), and therefore agrees to strictly monitor its Users' use of such subscriptions and enforce the applicable restriction. SFDC may monitor Customer's usage of the Event Monitoring Wave App subscriptions at any time through the Services. Event Monitoring Wave App is available in English only.

Free Sandbox with Unlimited/Performance Edition:

Sandbox subscriptions are for testing and development use only, and not for production use. As part of its system maintenance, SFDC may delete any Sandbox that Customer has not logged into for 150 consecutive days. Thirty or more days before any such deletion, SFDC will notify Customer (email acceptable) that the Sandbox will be deleted if Customer does not log into it during that 30-day (or longer) period. Deletion of a Sandbox shall not terminate Customer's Sandbox subscription; if a Sandbox is deleted during Customer's Sandbox subscription term, Customer may create a new Sandbox.

Government Cloud Premier + Success Plan:

Government Cloud Premier + Success Plan provides for products the support described in the Premier + Success Plan (https://sfdc.co/bDsV6q) ("Premier + Plan"), as amended by the following. Support Personnel: Government Cloud Premier + Success Plan support will be provided by Qualified US Citizens, subject to these terms. "Qualified US Citizens" are individuals who (1) are United States citizens; (2) are physically located within the United States while performing the support; and (3) have completed a background check as a condition of their employment with Salesforce. Research and development personnel and personnel that provide Administration Services under Government Cloud Premier + Success Plan support, that have logical access to Customer Data, and infrastructure support personnel that provide Government Cloud Premier + Success Plan support that have physical access to the Salesforce Government Cloud infrastructure, will be Qualified US Citizens. All other personnel, including, Customer Success Managers, Success Account Managers, Customer Success Technologists and any other personnel engaged in customer success roles and providing customer success services (collectively referred to as "Success Representatives"), will not be Qualified US Citizens and will not have access to Customer Data unless Customer provides such personnel a User ID or otherwise enables the sharing of Customer Data with such personnel. Telephone Support: Telephone support is available in English only, and twenty-four hours a day, seven days a week. Submitting a Case: Users may submit a case in the following ways, (1) In the Services by logging in, clicking "Help & Training," clicking "Contact Support," and clicking "Open a Case," then providing the requested information and clicking "Submit" ("On-Line Case Submission"). Cases submitted via this route shall be automatically routed to a team of Qualified US Citizens. (2) By telephone call to Customer Support as described in the

Premier + Plan. Calls for support received via telephone shall be initially responded to by individuals who are not Qualified US Citizens and who may be located outside the United States. These individuals will route cases to a team of Qualified US Citizens. These individuals will access the following information about Users in order to route the calls to Qualified US Citizens: first and last name, email address, username, phone number, and physical business address. To submit a case for Severity Level 1 issues, Customer must call Customer Support. (3) Cases submitted via Chat will not be responded to by Qualified US Citizens and will not be subject to the applicable response time described in the Target Initial Response Time table of the Premier + Plan.

Courtesy Administrators for Premier+ Success:

The Courtesy Administrators for Premier+ Success are provided to Customer free of charge for use only by the SFDC administration team in connection with Customer's purchase of the Premier+ Success Plan in order to allow SFDC to perform the administration functions described in the Premier+ Success Plan ("Courtesy Administrator Subscriptions"). After Customer's execution of this Order Form, SFDC will provide Customer with instructions on how to set up the Courtesy Administrator Subscriptions. For clarity, the Courtesy Administrator Subscriptions are provided on a one-time basis and Customer may not add on any additional Courtesy Administrator Subscriptions during the Order Term despite anything to the contrary in any agreement between Customer and SFDC.

Client Management Information System Implementation and Support Services

Requirements for Technical Architecture and Governance Advisory Support Services [170 points, 12 pages]:

Technical Architecture [95 points]

1. Describe how you approach translating business objectives into architectural principles and solutions.
   Click or tap here to enter text.

2. Describe the tools and processes you would offer for ongoing evaluation of the Solution's architecture to ensure the Solution design aligns with business practices and long-term vision.
   Click or tap here to enter text.

3. Describe how you would provide technical advisory services, including advising how the Solution integrates with the organization's existing IT ecosystem, possibly by way of assessments, broader integration vision and strategy development, and integration strategy execution.
   Click or tap here to enter text.

4. Describe your recommendations for best practice strategies for platform management and optimization.
   Click or tap here to enter text.

Governance Advisory Support [45 points]

1. Describe how you plan to partner with DHS in defining roles and responsibilities for governance activities, with a focus on equity of representation.
   Click or tap here to enter text.

2. Describe the proposed framework the DHS governance structure could use to ensure that proposed IT changes and initiatives to the Solution are evaluated using a consistent, but flexible criteria to assure a strong adherence to standards of data and reporting quality.
   Click or tap here to enter text.

Financial Management and Budget [30 points, not included in page count]

		Year 1	Year 2	Year 3	Year 4	Year 5
Number of Users (Per Role)	Superuser	10	15	20	25	30
	County Manager	15	30	60	120	240
	County Caseworker	45	90	180	360	720
	Provider Manager	15	30	60	120	240
	Provider Caseworker	45	90	180	360	720
	Total Number of Users	130	255	500	985	1950

Platform Rate (Per User Type Per Month)	Superuser					
	County Manager					
	County Caseworker					
	Provider Manager					
	Provider Caseworker					
AND/OR	Platform Flat Rate (Annual)					
	Annual Platform Cost					

App or Accelerator Rate (Per User Type Per Month)	Superuser	$0	$0	$0	$0	$0
	County Manager	$0	$0	$0	$0	$0
	County Caseworker	$0	$0	$0	$0	$0
	Provider Manager	$0	$0	$0	$0	$0
	Provider Caseworker	$0	$0	$0	$0	$0
AND/OR	App or Accelerator Flat Rate (Annual)	$0	$0	$0	$0	$0
	Annual App or Accelerator Cost	$0	$0	$0	$0	$0

Professional Services (Number of Hours)

Professional Services (Rate Per Hour)

	Year 1	Year 2	Year 3	Year 4	Year 5
Travel Costs	$30,000.00	$15,000.00	$7,500.00	$3,000.00	$3,000.00

Additional Information

Platform Rate Based on:

App or Accelerator Rate Based on:

Define Role's Tasks and Responsibilities:

Define Other Costs

Travel Costs	Estimated travel costs

Other Costs	Salesforce Event Monitoring							Salesforce Event Monitoring	Priced as 10% Net Salesforce License Price
	Salesforce Government Cloud							Salesforce Government Cloud	Priced as 10% Net Salesforce License Price
	Other Cost 4:							Other Cost 4:	
	Other Cost 5:							Other Cost 5:	
	Annual Other Costs								

Total Cost of Ownership	Platform Cost	
	App or Accelerator Cost	
	Professional Services	
	Other Costs	
	Grand Total	

Summary	Total Number of Users	130	255	500	985	1950		Weighted Average Monthly Cost Per User	
	Total Cost Per User Per Month								