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| **STATEMENT OF REQUIREMENTS (SOR)**  **SOR # VITA-230501-01-CAI**  ***VITA Enterprise Salesforce Operations and Maintenance Services*** |

1. **Date:** May 1, 2023
2. **Authorized User**: Virginia IT Agency (VITA)
3. **Authorized User Contact Information:**

*Jamey Stone*

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1. **Solicitation Schedule:**

|  |  |
| --- | --- |
| **Event** | **Date** |
| Release SOR | 05/01/2023 |
| Supplier Response Due | 05/02/2023 |
| Award Decision | 05/03/2023 |
| Estimated Project Start Date | 05/09/2023 |

1. **Evaluation and Scoring**

Supplier’s Response must be submitted in the specified Statement of Work (SOW) format and will be evaluated for format compliance.

Supplier’s Response will be evaluated for technical merit based on its appropriateness to the performance of Authorized User’s requirements, its applicability to the environment, and its effective utilization of Supplier and Authorized User’s resources.

1. **Project/Service:**

Enterprise Salesforce Operations and Maintenance Services

1. **Specialty Area** (Check one)**:**

☐ Application Development ☒ IT Infrastructure

1. **Contract Type:**

☒ Hybrid Model: Base Fixed Monthly Fee with Optional T&M (Hourly) Component

1. **Introduction:**

Project History

To serve the needs of agency customers, VITA is preparing to offer Salesforce services to the COVA enterprise. VITA does not have the current capacity in house to manage the Salesforce environment and has chosen to outsource the services to an outside vendor.

Business Need

VITA requires Enterprise Salesforce services in alignment with VITA’s Mission, “To deliver sustainable and effective results to our customers through innovative, efficient and secure services.”

The services must be designed to provide a flexible model to meet the needs of COVA agencies at their self-defined level of size or complexity. The services must also offer VITA a central administrative team that can provide management and support in a predictable manner.

The services are divided into the following logical categories:

* Enterprise Salesforce O&M Support and
* Enterprise Salesforce Optional Services

The following are the key guiding principles for this Enterprise Salesforce Support:

* Secure
* Scaleable
* Repeatable
* Provide agencies maximum flexibility without compromising VITA Security Standards and Practices

While an organization will have the ability to self-implement their solutions, VITA will retain Super Admin Access. This Access is designed to keep the enterprise secure and in alignment with the controls setup by the SPLM process.

Project Management and Organizational Structure

The Supplier will provide a Project Manager who will be responsible for directing the Supplier services. The Supplier PM will report to the VITA Enterprise Services Manager.

1. **Scope of Work:**

This SOR defines the services required by Authorized User in support of the Project/Service.

**Scope Part A: Base Level Operations and Maintenance Support**

Virginia Information Technologies Agency’s (VITA) is offering Salesforce Support for all Agencies. In support of this offering Supplier will provide Salesforce Enterprise O&M Support and Optional Service Offerings. As part of the Salesforce Enterprise O&M Support, Supplier will setup a Multiple Org (Hierarchy) structure as displayed in the diagram below:

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For each Production Org during initial setup, the Supplier will:

* Manually manage Multiple Orgs in GovCloud (CONUS) - Standard
* Implement SPLM required integrations per Org
* Enable Multi Agency Data Separation (Standard)
* Enable Agency Specific Access and Controls (Standard)
* Enable Agency Standard Roles & Profiles (Standard)

Once a Production Org is established, Supplier will provide ongoing Salesforce Enterprise O&M Support that will include:

* Maintaining One Central VITA Production Org
* Maintaining One Central Sandbox (in the VITA Org) used to demo generic use cases
* Maintaining One Production Org Per Agency
* Providing Production Org Refresh up to 3 times a year (provided all applications in the org are supported by Supplier/VITA)
* Providing Security and User access support as defined by VITA SPLM Process
* Manual reporting of user licensing and their usage related to billing

Please Note: This service does not include the purchase, installation or maintenance of any hardware and/or software, e.g. servers, databases, firewalls, product licenses etc.

The table below outlines the Services Provided by the Supplier and VITA Helpdesk for the Salesforce Enterprise O&M Support:

|  |  |
| --- | --- |
| **Tier** | **Responsible Party** |
| Tier I | VITA Helpdesk |
| Tier II\*\* | Supplier |
| Tier III\*\* | Supplier |

***O&M Ticket Types***

The table below identifies the ticket types by Tier:

|  |  |  |
| --- | --- | --- |
| **Tier I** | **Tier II \*\*** | **Tier III \*\*** |
| **Managed by VITA Helpdesk** | **Managed by Supplier** | |
| * Password Reset * Hardware Issues * Login /Access Issues * PC or Device Issues * Browser & Salesforce Mobile App Support/Issues * All non Salesforce Related Tickets | * User account management (Add, Remove, Update users to existing Roles & Profiles) * Enterprise Agency License usage Reporting * Active License/Billing Report * Managing Group Admins * User authentication * Multi factor Authentication requests * Triage Configuration Related items & Propose Solution | * Multiple Orgs in GovCloud * SPLM Required Integrations -   + Salesforce OKTA Setup   + Salesforce SIEM Integration   + Salesforce Geofencing Configuration - VITA employees cannot be outside the US when they log into Salesforce/Salesforce Mobile App   + Salesforce DLP Integration   + App Connector OKTA Setup   + App Connector SIEM Integration   + App Connector Network Connection Configuration   + Salesforce Identity Connect Configuration * Security Related Updates * Salesforce Quick Start   + Enable Core Salesforce PSF License * Salesforce Agency Specific Licenses   + Enable additional Salesforce Licenses as identified in setup ticket * Permissions, Profiles & Roles Administration * Profile & Role configurations * Triage Code Related items * Triage Existing Integrations * Open Ticket with Salesforce * Coordinate with Salesforce and VITA to identify, triage & resolve issue * Platform bugs and errors * Document and communicate resolution to VITA |

**Core Support Hours** - Supplier’s core support hours are 8 am to 5 pm (EST), Monday through Friday. However, the Supplier may be required to perform code promotion and application support work outside of normal working hours due to operational needs.

**Supplier Off-Hours Support** - In the event of a Sev1 or Sev 2 issue (as defined in the table below) Supplier will manage the ticket with Salesforce and VITA. Supplier will provide VITA a list of names and contact information for personnel available for off-hour support.

Table

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**Scope Part B: Optional Time and Materials Support Services (Check One):**

☐ No additional T&M services outside of the base level support will be needed

☒ Authorized User requires additional T&M support services as defined below.

The Supplier will deliver optional Salesforce service offerings via T&M at a blended rate which should be defined in the SOW response. The Supplier should provide the fixed number of T&M hours required for the support of each optional service.

1. **Period of Performance:**

The period of performance for the services shall be twelve (12) months.

1. **Place of Performance** (Check one)**:**

☐ Authorized User’s Location

☐ Supplier’s Location

X Authorized User’s and/or

Supplier’s Location

1. **Project Staffing**
2. **Supplier Personnel**

The roles listed in the table below represent the minimum Supplier personnel requirements for this engagement. Supplier shall outline the required team and hourly rates in their SOW response.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Key Personnel (Y/N)** | **Years of Experience** | **Certifications** | **References Required (Y/N)** |
| Project Manager | Y | 5+ | N/A | N |
| Technical Architect | Y | 5+ | Relevant Salesforce | N |
| Administrator | Y | 1-3 | Relevant Salesforce | N |
| Engineer | Y | 3-5 | Relevant Salesforce | N |
| Business Systems Analyst | Y | 3-5 | Relevant Salesforce | N |

1. **Authorized User Staff**

The roles listed in the table below represent Authorized User’s staff and the estimated time each will be available to work on the project.

|  |  |  |
| --- | --- | --- |
| **Role** | **Description** | **% Project Availability** |
| Technical Lead | Primary POC between Authorized User and Supplier | 10% |
| Subject Matter Experts | Provide business knowledge and expertise | 10% |
|  |  |  |

1. **Deliverables:**

The Supplier will provide the following deliverables throughout the course of this engagement:

* Weekly Report detailing list of open tickets and status
* Monthly project status report
* Root cause analysis documentation as required
* Release notes of configuration changes
* Monthly report tracking billable hours and tasks

The Supplier should provide all deliverables in electronic form, using the following software standards (or lower convertible versions):

|  |  |
| --- | --- |
| **Deliverable Type** | **Format** |
| Text Document | Microsoft Word |
| Spreadsheets | Microsoft Excel |
| Presentation | Microsoft PowerPoint/Visio |
| Project Management | Microsoft Project |

1. **Travel Expenses** (Check one)**:**

X No travel will be required for this engagement

☐ Travel must be included in the total fixed price of the solution

1. **Payment** (Check all that apply)**:**

☒ Payments made monthly based on approved timesheets

1. **Acceptance Criteria:**

Acceptance of services provided under the SOW will be based upon Authorized User’s approval of timesheets submitted by the Supplier. Supplier will provide monthly reports to VITA detailing the hours expended per activity.

1. **Project Roles and Responsibilities:**

| **Responsibility Matrix** | **Supplier** | **Authorized User** |
| --- | --- | --- |
| * *SPLM requirements* * *Service Desk Readiness checklists* * *Identify tasks and deliverables for Salesforce and Supplier to provide for service launch* * *Purchase Salesforce Licenses* * *VPN access to Supplier Staff* |  | X  X  X    X  X |
| * *SPLM artifacts and design documents* * *Salesforce training artifacts* | X  X |  |
| * *Identify key deliverables needed to complete service catalog offering* * *Identify service desk(s) needs to enable service* | X    X |  |
| * *Access to OAuth* * *Access to Key contacts* * *Whitelist URL* * *Open ports for file transfer* * *Provide ServiceNow and environment access to Supplier* * *Access to Security SME* |  | X  X  X  X  X    X |

1. **Criminal Background Checks and Other Security Requirements (**Check all that are required):

X Standard CAI Required Background Check

X Agency Specific Background Check – VITA fingerprinting

1. **Performance Bond** (Check one)**:**

☐ Required for *(XXX)*% of the SOW value

X Not Required

1. **Reporting** (Check all that are required):

X **Monthly Status Update**

The weekly status report, to be submitted by Supplier to Authorized User, should include: accomplishments to date as compared to the project plan; any changes in tasks, resources or schedule with new target dates, if necessary; all open issues or questions regarding the project; action plan for addressing open issues or questions and potential impacts on the project; risk management reporting.

☐ **Other(s)** (Specify)

1. **Federal Funds** (Check one):

☐ Project will be funded with federal grant money

X No federal funds will be used for this project

1. **Training and Documentation:**
2. **Training is:**

☐ Required as specified below

X Not Required

Training Requirements:

*(Specify specific training requirements)*

1. **Documentation is:**

X Required as specified below

Not Required

Documentation Requirements:

As specified in the scope of work and deliverables sections of this SOR

1. **Additional Terms and Conditions:**

The services to be provided are subject to the following additional provisions:

1. Effective July 1, 2020, the Code of Virginia requires contractors with the Commonwealth who spend significant time working with or in close proximity to state employees to complete sexual harassment training.  As a result of the new code, VITA and the Department of Human Resource Management (DHRM) are requiring that all contractors working through the CAI contract complete DHRM's "Preventing Sexual Harassment" training.  This training is available as either a short video or a written transcript on the DHRM website: <https://www.dhrm.virginia.gov/public-interest/contractor-sexual-harassment-training>. The selected Supplier must agree that any assigned resource will complete the training.
2. The selected Supplier must agree that any assigned resource will review and conform to the IT Contingent Labor Program (ITCL) Contractor Code of Conduct. The Code of Conduct can be reviewed on VITA’s website at the following link:

<https://www.vita.virginia.gov/media/vitavirginiagov/supply-chain/pdf/Contingent-Worker-Code-of-Conduct.pdf>

1. **Scheduled Work Hours:**

Core support hours are Monday through Friday, 9am to 5 pm

1. **Facility and equipment to be provided by Authorized User:**

Supplier will provide their own equipment