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**Stealth Solutions, Inc.   
Proposal  
to the  
Virginia Department of Social Services (VDSS)**

**For**

**AmeriCorps Grant Reporting Solution**

**Request for Proposal (RFP)# CVS-21-061**

**February 10, 2021**

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| Submitted electronically to:  Dan Vasquez, Sr. Contract Officer, danilo.vasquez@dss.virginia.gov | Submitted by:  Rahul Sundrani, President 22648 Glenn Dr., Suite 206 Sterling, VA 20164 |

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# RFP Cover Sheet and Addenda Acknowledgements

On the following pages, Stealth Solutions includes the following:

* RFP Cover Sheet; and
* Addenda 1 Acknowledgement.



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# Cloud Services Terms and Conditions

| 2. Obtain Cloud Services Terms and Conditions at enterpriseservices@vita.virginia.gov and submit any redlines in the document with proposal; must redline the actual document for context review by VITA SCM and Director, ECOS. |
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| Stealth Solutions includes a redlined version of the Cloud Services Terms and Conditions embedded below. |

# ECOS Assessment Forms I-003

| 3. Obtain ECOS Assessment Forms I-003 at https://vccc.service-now.com/vita Submit complete and accurate responses with proposal; notify agency of any proprietary responses;(this is not evaluated) |
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| Stealth has embedded an ECOS Assessment Form I-003 below. |

# Other Required Forms

| 4a. Offeror Data Sheet, included as an attachment to the RFP, and other specific items or data requested in the RFP. (Attachment A) |
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| 4b. State Corporation Commission Form (Attachment C) |
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| 4c. Proprietary/Confidential Information Identification |
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| Stealth Solutions does not deem any information in this response as proprietary/confidential. |

| 4d. Pricing Schedule (Attachment D) |
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| 4e. Commonwealth of Virginia substitute W-9 Form |
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| 4f. Additional Questionnaire (Attachment B) |
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# Experience and Qualifications

| 5a. Written Narrative. A written narrative statement to include executive summary, including the history of the firm and years in business, size in terms of staffing, activities providing services described herein. Names, qualifications and experience of personnel to be assigned to the project. If applicable, organization chart outlining the structure of corporate staff and project staff and a short description of project staff supported by individual resumes of staff to be assigned to the project, including consultants must meet qualifications. |
| --- |
| Stealth Solutions (Stealth) is a Virginia-based 8a small business that was incorporated in 2014, with key team management involved with and certified at various levels of Salesforce for over 10 years each. Stealth is a consulting partner of Salesforce. As a Salesforce Consulting Partner, Stealth provides our clients the expertise to configure, customize, and develop customer-specific applications on the Salesforce Platform like Grants Management, Contact Management, Learning Management, and others.  Stealth’s Salesforce team encompasses a mindset to deliver maximum value to clients while transitioning to Salesforce and continued operational support excellence to realize Salesforce value indefinitely. The Salesforce team was built by hiring the best talent in the market and mentoring the talent to deliver results the way Stealth has always delivered.  The four key areas of Stealth’s Salesforce team deliverables are as follows:   * Stealth’s Salesforce Consulting Services – One of the biggest IT challenges organizations face today is: Should we move to the cloud? If so, then two critical decisions must be made: 1) What cloud to choose, and 2) Which apps to move. Stealth Salesforce Consulting Services works with clients as their trusted IT Partners in identifying what applications are best suited to migration to Salesforce and lays out a migration and product roadmap for a Salesforce Transition. As a part of the transition, Stealth also works with clients on process enhancements, data migration strategies, and change management challenges. * Stealth’s Salesforce Implementation Services – As a part of the Implementation services, we provide our clients with the expertise to implement Salesforce to deliver maximum value. We provide a team of Salesforce consultants who are certified and experienced in configuration, customization, integration, data migration, etc. * Stealth’s AppExchange Product Implementation – The enterprise marketplace available from Salesforce – AppExchange – provides 3,000+ enterprise applications that can be used by many customers for various business needs and can eliminate a significant custom development effort. Even though AppExchange provides many great applications that can be quickly downloaded and installed, many applications need either configuration or customization to the core product. Stealth works with clients in providing the following AppExchange services: * Analyze Build vs. Buy; * Analyze, Demo, Trial, Evaluate, and Recommend best AppExchange products to meet client needs; * Deploy, Configure, Customize, and Support the selected product. * Stealth’s Client Operations Management Program (COMP) is a monitoring, maintenance, enhancement service offered to clients with Salesforce systems already established. COMP is provided with an assortment of support options based upon each client’s specific needs. Standard services involve basic O&M services, including user management, release preparation, problem solving, testing, documentation, and critical updates. Additional services entail system enhancements, impediments, defects, and business function change requests. COMP clients have a Subject Matter Expert on staff to support their needs to remain operable through system issues, expansion, and user growth; these include support for the Salesforce releases three times a year, third party application add-ons, API interfaces, records management, and more.   Stealth’s Salesforce team will utilize the expertise of these four key areas to meet the needs of the “Reporting Solution.” This will enable the VDSS to meet programmatic and financial reporting requirements of the federal grantor, monitor subrecipient program progress, evaluate performance and compliance, receive reports of expenditures for cost reimbursement, and facilitate overall the compliant administration of VDSS State programs.  Stealth’s project deliverables are further detailed in this proposal.  Key Personnel  Our proposed staffing for key positions brings more than 45 years of combined experience in grants, technical, and management domains and are ready to start on day 1. The table below lists the key personnel assigned to support VDSS.   |  |  |  |  | | --- | --- | --- | --- | | Name | Proposed Role | Duration | Experience | | Nambi Raghupathy | Developer | 100% | 20 years | | Rahul Sundrani | Project Manager/Analyst | 100% | 25 years |   Each team member has the experience and qualifications to provide the services requested in the VDSS RFP. Relevant experience for each proposed project team individual follows.  Nambi Raghupathy (Developer)**—**Mr. Raghupathy possesses 20 years of progressive experience in the design, development and management of large-scale web-based applications. He is a Salesforce certified Administrator and Developer. He has more than 16 years of Project/Program Management experience working in the private and public sectors. He has managed all stages of project lifecycle from requirements gathering, user interface design, application coding, testing, deployment, system maintenance, documentation, and end user support. He has extensive experience setting up PMOs and working with clients to ensure project oversight and reporting requirements.  Rahul Sundrani (Project Manager/Analyst)**—**Mr. Sundrani is a Salesforce-certified expert with more than 25 years of experience developing enterprise projects. Mr. Sundrani has more than 15 years of experience conducting the analysis phase of projects to identify, elicit and document requirements, modeling business processes, developing workflow models, creating test plans, and creating and delivering training curriculums.  Complete resumes for each of our key personnel are provided on the following pages.  **Nambi Raghupathy**  Salesforce Solution Architect/Developer  SFU_CRT_BDG_Pltfrm_Dev_I_RGB  Experience overview  Nambi Raghupathy has more than 13 years of Experience in Salesforce.com Implementation, Cloud Transformation, Solution Design, Project Management and AppExchange Product Management. He has implemented various modules of Salesforce for 75+ clients in the last 10 years. Mr. Raghupathy has been a Salesforce and Cloud Evangelist enabling many organizations transform their BD, sales and support teams from legacy systems and processes to Salesforce.com. His key strengths include strong interpersonal and communication skills, following best practices, problem-solving ability and adherence to project schedules.  **Clearance:** Public Trust, Small Business Administration  Education  Master of Business Administration (MBA) – Sam M Walton College of Business, University of Arkansas  Bachelor of Engineering – Electrical and Electronics, PSG College of Technology, India  Technical Domain and Functional Expertise   * Salesforce Service Cloud * Salesforce Sales Cloud * Customer and Partner Communities * AppExchange Product Development   certifications and Technology–Specific training   * PMP Project Management Professional – PMI Institute * Salesforce Certified Administrator * Salesforce Certified App Developer   Project Experience  **Stealth Solutions, Inc. March 2020–Presen**t  *Salesforce Solution Architect*  Working with Stealth Solution clients in designing and building applications on the Salesforce platform. Advising clients on how to best transition to Salesforce platform and developing the roadmap for transforming legacy systems into best in class cloud applications on the Salesforce platform.  **Technology Solution Provider Inc. March 2020–Presen**t  *Salesforce Technical Analyst*  Working with Small Business Administration (SBA.gov) Office of Disaster Assistance (ODA) on implementation of Disaster Center Management System on Salesforce platform. Project involves transformation of multiple legacy systems in a single Salesforce application and primarily involved in Disaster Management module of Salesforce implementation   * Identify pain points and design a solution for end to end Disaster management on Salesforce platform * Prepare Business Requirements Documents, conduct review sessions with developers and ensure designed solution is delivered on time with highest quality.   **Maryland Health Benefit Exchange, State of Maryland November 2016–February 2020**  *Salesforce Solution Architect*  Identified Legacy Applications to be migrated to Salesforce.com. Designed and Developed various applications on Salesforce platform to support different verticals within the State Agency.   * Implemented Salesforce Service Cloud for MHBE Call center to support handling of over 5000 cases every day * Modernized the legacy Learning Management System using Salesforce platform and customer communities. * Implemented a time tracking and invoicing system for all consultants currently working with MHBE   **REI Systems Inc. July 2008–October 2016**  *Salesforce Project Manager*  Implemented Salesforce for more than 50 clients in the east coast. Conducted Business Process Review sessions for all of the clients to determine the “as is” and “to be” business processes and implemented the same in Salesforce. Design solutions to meet the client’s business problems and work with the development team in implementing the solution. Conducted end user training for all users and did a knowledge transfer to all the system administrators   * Developed and Managed a Product on Salesforce AppExchange Platform * Implemented Salesforce for more than 50 clients in different verticals * Designed solutions, performed data migrations and conducted end user trainings along with change management for all implementations.   **Rahul Sundrani, PMP, CSM**  Project Manager/Analyst  Experience overview  Rahul Sundrani is a PMP-certified senior IT professional with more than 12 years of hands-on Systems Development Life Cycle (SDLC) experience with large-scale enterprise-wide systems development and more than 7 years of project and program management experience in the Federal and Commercial sectors. His problem solving aptitude and ability to work well with complex systems has proven to be a great asset on multi-stakeholder and multi-vendor projects including at DC Department of Health’s Grant Management System, Fannie Mae’s Identity and Access Governance Program, Department of Energy’s scientific research grants management system, and the Small Business Administration’s (SBA).gov portfolio. Mr. Sundrani is a self-motivated individual with the ability to work independently or within a team. He is detail-oriented with a strong willingness to learn new things. Mr. Sundrani possesses excellent communication skills and is proficient in mentoring.  Education  M.S., Computer Science, Mississippi State University, Starkville, Mississippi, 1997  B.S., Engineering. Nagpur University, Nagpur, India. 1993  Technical Domain AnD FUNCTIONAL Expertise   * SDLC and Agile application development using J2EE/Java technology stack, .Net stack, Salesforce (Force.com Cloud Application Development), and Drupal * Project and Product Management * Requirements Management * Enterprise Architecture * Analytics, Metrics, and Customer Satisfaction Measurement * End User Training * Retail, manufacturing, service, and finance industries * Louisiana Community and Technical College System (LCTCS) – State Government   certifications and Technology–Specific training   * Certified Scrum Master (CSM) * Salesforce.com Certified Force.com Developer * Project Management Professional (PMP) * Sun Certified Programmer for Java 1.4 * Sun Certified Web Component Developer for J2EE Platform. * Sun Certified Instructor on 9 Java / XML courses   Project Experience  **REI Systems, GovGrants® August 2014–Present**  *Product and Implementation Manager*  Assisting REI Systems with development of grants management product GovGrants, an enterprise grants management system built on world’s largest cloud platform Salesforce. GovGrants is a highly configurable product targeted towards federal, state, and local government.  Key responsibilities include:   * Providing strategic and technical leadership and collaborating with sponsor, functional and technical team on product development and enhancement * Transforming the GovGrants product from concept to mature state and lead the Product implementations in Federal (USAID), State (Louisiana College System), and City Government (District of Columbia, Department of Health). * Requirements elicitation using JAD sessions & conducting user interviews, preparing functional documents such as Use Cases, Software Requirements Specifications (SRS), and Wireframes. * Business Processes reengineering, mapping client processes to GovGrants capabilities, developing solution, and leading implementation. * Managing budget, on-time delivery, and scope for all implementations.   **Small Business Administration (SBA), SBA.gov August 2015–Present**  *Adviser (Formerly) Program Manager, August 2011 – July 2013*  Mr. Sundrani is currently engaged as an adviser, assisting SBA.gov team on strategies, approaches, and solutions. Recent activities include assessment of SBA.gov mobile site, SBA.gov roadmap, and refining the technical and content strategy to align with the mobile roadmap.  Formerly, Mr. Sundrani was the Program Manager for the SBA.Gov portfolio, overseeing multiple initiatives for SBA that assisted in fulfilling the Agency mission of assisting small businesses. These initiatives promote small business resources and services on Agency social media channels and SBA.Gov, which receives over 20 Million unique visitors annually. He was accountable for the program annual budget of $4.85 Million and project scope that included strategic and thought leadership, product/roadmap management, content and outreach management, web design/development, and helpdesk/operations support while managing a 20-member technical team and subcontractors responsible for communication, outreach, and usability.   * Responsibilities included executing the program management activities, performance evaluations, risk and issue management, change management, quality assurance, assistance with capital planning, project plan maintenance, and ensuring all activities are completed on time and within budget. * Mr. Sundrani’s noteworthy accomplishments include leading initiatives that helped improve SBA.gov average response time by over 50%, section 508 compliance by 40%, site availability close to 100%, increasing website traffic by 6 Million visits between 2011 and 2012, and significant improvement of SBA’gov’s Foresee Client Satisfaction Score.   **Fannie Mae, Identity and Access Governance January 2014–August 2014**  *Project Manager*  Mr. Sundrani led the vendor team (Sila Solution Group) with the implementation of the Identity and Access Governance product called SailPoint IdentityIQ. The goal of the program was to realign Fannie Mae’s current Identity and Access Management certification and provisioning practices to industry accepted standards and best practices.   * Responsibilities included defining the scope, Statement of Work, pricing, establishing contracts, invoicing, development & maintenance of an integrated plan and overseeing requirements analysis, design, and development.   **Department of Energy, Grants Management System July 2013–January 2014**  *Program Manager*  As the program manager, Mr. Sundrani managed the development and support of the Department of Energy’s Portfolio Analysis and Management System (PAMS). He led all software development and maintenance activity using SDLC methodology and managed a 30+ member team of developers, testers, and analysts with a project budget of $5 million.   * Responsibilities included executing program management activities, risk and issue management, change management, quality assurance, assistance with capital planning, project plan creation, maintenance, and ensuring completion of activities. * Mr. Sundrani’s key accomplishments included successful deployment and adoption of the largest functionality of the PAMS Pre-award, Award and Reviewer modules and was instrumental in establishing a follow-on work stream for implementing Post-Awards functionality.   **Office of Management and Budget (OMB) Federal IT Dashboard (Itdashboard.gov) December 2010–August 2011**  *Project Manager*  As the project lead for ITDashboard.gov, Mr. Sundrani managed the development, maintenance, and support of the IT management tool that the United States Federal Government CIOs use in overseeing their annual IT spending budget totaling over $75 billion. He led software development activity using agile methodology by managing a nine-member team of four software engineers, two business analysts, and two quality assurance engineers with a project budget of $1 million for the development of IT Dashboard which is a Drupal-based application, employing the Drupal API, several community contributed modules, custom modules, and theming.   * Responsibilities included requirements gathering and analysis, designing and implementing change requests, overseeing development, coordinating deployment, supporting a user community across 27 federal agencies, and project reporting to Federal (OMB/GSA), and REI senior management. * Notable accomplishments include leading the effort of open sourcing IT Dashboard to enable communities of interest to adapt and mature their versions of the Dashboard to meet their unique needs and sharing the lessons learned from the ITDashboard.gov project at “Drupal.org” and “Drupal Government Days Conference”.   **NYC Comptroller Office, M/WBEReportcard.com October 2010–December 2010**  *Project Manager*  As the project lead for the MWBEReportCard.com, Mr. Sundrani was responsible for leading the development of a website that tracked New York City government spending with Minority and Women-owned Business Enterprises (M/WBEs). The site was developed in 10 weeks using agile methodology. Mr. Sundrani managed a seven-member team of five software engineers, one business analyst, and one quality assurance engineer with a project budget of $250,000. The M/WBE Report Card NYC is built upon Drupal framework. This is a Dashboard that gives the public user-friendly, interactive data that graphically presents just how much, or how little each city agency spends from its eligible budget with minority and women-owned business enterprises.   * Activities included understanding and researching the NYC financial data sources, understanding data collection and integration, developing requirement specifications, project plan, cost estimates, and managing the design, visualization, and development efforts.   **Office of Management and Budget (OMB), Performance.gov January 2010 – September 2010**  *Project Manager*  As the project lead, Mr. Sundrani was responsible for leading the initiative from inception to launch. Mr. Sundrani led this software development activity using agile methodology, managing a seven-member team including five software engineers, one business analyst, and one quality assurance engineer with a project budget of $1.2 million. Performance.gov is built as a collection of microsites dashboards using Drupal, which supports President Obama’s Government performance management strategy with the objective to close the gap between commercial and federal government.   * Responsibilities included, understanding and researching the Federal Performance, Acquisition, Finance, Technology, and Human Resources domain, collaborating with Federal leaders in eliciting requirements, understanding metrics, data collection, analyzing policy impacts, overseeing development and deployment, supporting user community from 26 federal agencies, and project reporting to Federal (OMB/GSA), and REI senior management.   PRIOR EXPERIENCE   * **Technical Lead, Federal Emergency Management Agency** (April 2009 – December 2009): Responsible for the development and maintenance of FEMA’s Emergency Grants Management System. * **Specialist, Ahold USA/EDS/HP** (September 2005 – April 2009): Technical lead accountable for managing over 30 web applications. * **Adjunct Instructor, ITT Tech** (September 2004 to December 2007): Responsible for teaching programming courses involving Java, Visual Basic, C++, and C technologies. * **Senior Systems Analyst, Household International/HSBC** (September 2003 – January 2004): Responsible for leading and consulting on Java and J2EE technologies to different development teams within the organization. * **Java and XML Trainer, Sun Microsystems** (November 2000 – September 2003): Responsible for developing and providing training on Java/J2EE system analysis, architecture, design, and implementation courses. * **Senior Developer, Lante Corporation** (January 2000 – November 2000): Responsible for the development of J2EE web application for Health-Care eMarket (HIPPO.com). * **Software Engineer, Motorola** (May 1998 – January 2000): Responsible for development of a Java application to validate the quality of the phones Motorola produced and electronically transferred the phones to the Motorola distribution center. |

# Plans and Methodology for Providing the Proposed Goods and Services

| 6a. Describe your Plan to assess training needs. |
| --- |
| Stealth understands that end-user training could be a key factor in determining the success of project implementation. Hence a lot of planning and preparation is done for conducting our end-user training.  The following activities are performed by Stealth Solutions to assess training needs:  **Determine Types of Users**: Stealth will work with VDSS to identify the different types of users and will determine the content of training sessions accordingly. Based on the types of users, different types of training sessions will be conducted such as internal user training, webinar for external users, executive training, etc.  **Determine Total Number of Sessions**: Based on the total number of users and types of users identified, the total number of training sessions will be determined. The sessions will be scheduled and communicated to the corresponding users ahead of schedule in order to avoid conflicts. All training sessions will also be recorded and the recordings made available to the end users.  **Prepare Training Environment**: A Sandbox will be created which has the exact configuration and customizations as the actual production system. Training accounts will be created for the users as needed. The passwords will be distributed to the users before the session. End users will be able to perform all operations such as entering grant-related data for reporting purposes. End users will also be able to enter time sheets, submit expenses, etc.  **Upload Test Data:** Prior to the training session, sample data will be uploaded which will be close to the current production data without any of the PII or confidential information. Grant programs will be set up for which end users will be able to generate reports.  **Conduct Demo**: Before the commencement of the training sessions, a demo session will be conducted for all users where a Stealth Trainer will walk through in detail all modules of the solution. The demo session will ensure that end users are better prepared for the actual training sessions. The recording of the demo will be shared to all identified end users.  **Prepare Custom User Guides**: Before the training session, end-user training guides/cheat sheets will be prepared and distributed to all users. The end user guide will ensure that all functions required by the end users are documented.  **Conduct Training**: As determined by the training schedule, the Stealth Trainer will conduct hands-on training sessions and webinars as agreed. The training sessions will be conducted in a training environment where test users and data have already been set up. The training sessions will ensure that all users are able to use the application to meet their user roles and perform their daily functions. |

| 6b. Timeline describing what, when and how the training will be performed. |
| --- |
| Stealth Solutions will provide the following training steps before the Go Live:  **1 week prior to Go Live –** A demo is conducted for all users showing the end-to-end functionality. This demo will ensure that users are better prepared for the actual training sessions. The demo will be recorded and distributed to all users.  **5 days before Go Live –** Sys Admin training and knowledge transfer for the identified system administrators. Training provides the ability for Sys Admins to manage the system and provide Tier 1 support if needed.  **4 days before Go Live –** External User Training. This will be a webinar for all external users of the system.  **3 days before Go Live –** Internal End user training. This will be a complete hands-on training for the internal users to be able to use all functionalities of the application. |

| 6c. Approach to developing training curriculum that addresses stated learning objectives |
| --- |
| Stealth Solutions develops various types of training materials and distributes them to the users by type/profile of the user. All guides are prepared as concise documents focused on providing the users with the required information to fulfill their role.  **Internal End User Guide**: This guide is a PDF document which contains screenshots of various functions and describes how a user can quickly navigate the system, perform their key tasks, etc. The focus of this document is to describe how to generate reports, approve time sheets, approve expense reports, and perform other internal functions of VDSS.  **System Administrator Guide**: This guide is distributed to the identified system administrators who shall be managing the system post-Go Live. Links are provided that have documentation to basic system maintenance such as user management, license management, access management, etc.  **External End User Guide**: This guide focuses on the external users and how they can use the application to submit grant information, time sheet, expense reports, etc., through the portal  **Recorded Demo**: Stealth will conduct a complete demo of the solution prior to the training sessions to make users familiar with the system. This demo will be recorded and distributed to all users of the system.  **Recorded Webinar**: Since the external user group is large, a webinar (one or more if needed) will be conducted for the external users and the recording of the webinar will be made available within the portal.  **Recorded Training Sessions**: All key parts of the training sessions will be recorded and shared with the users. |

| 6d. What, when, and how the training will be performed. |
| --- |
| The following table summarizes the different training sessions provided by Stealth Solutions.   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Type of**  **Training** | **Training Setting** | **Intended Audience** | **Materials Provided** | **Expected Training Result & Timeline** | | Internal User Training | In Person/Virtual Hands on | All internal users  of the system | Custom End User Guide prepared by Stealth Solutions | User should be comfortable in using all functionalities – 3 days before Go Live | | Sys Admin Training | In Person/Virtual Hands on | Identified System Administrators | Sys Admin guide provided by Salesforce | Sys Admins should be able to maintain the system post-Go Live – 5 days before Go Live | | External User Training | Webinar | All external users of VDSS | Custom End User Guide prepared with more focus on external users | External users should be able to enter time sheet, submit expense. etc. – 4 days before Go Live | | Recorded Video Demo | NA | All users of the application | Recorded Demo of the Application | Any user should be able to access the recording as needed and understand the specific training – 1 week before Go Live | |

| 6e. Describe your maintenance and support of the software reporting system. |
| --- |
| Stealth Solutions offers Tier 1 and Tier 2 support to address all critical issues. Stealth provides a support management system within Salesforce that tracks all Tier 1 and Tier 2 support requests. The table below describe support types that are supported by Stealth and Salesforce for the system post-Go Live.   |  |  |  |  | | --- | --- | --- | --- | | **Support Type** | **Method of Support** | **Offered by** | **Type of Issues Supported** | | Tier 1 | Phone/Email | Customer/Stealth Solutions | User Management,  Password Management, Basic System Management | | Tier 2 | Phone/Email | Stealth Solutions | Customization Requests, Advanced System Management | | Tier 3 | Phone/Email | Salesforce | Platform Management, Feature Enablement |   Stealth has resources to provide post-Go Live support. The support resources will assist the VDSS System Administrators with any customization requests or system management tasks. Any tasks that cannot be performed by Tier 1 support will be handled by Tier 2. Stealth will work with Salesforce for any Tier 3 platform-related support issues like platform upgrade, enabling a new feature, etc. Please note that Tier 2 customization support is available for an additional cost.  Maintenance  There are two types of patch release/ major updates that would be available to VDSS for maintenance of the solution:   * Platform Upgrade/Patch Release from Salesforce; and * Maintenance Update from Stealth Solutions.   **Platform Upgrade/Patch Release from Salesforce**: One of the biggest advantages of building the solution on the Salesforce platform is that all customers are hosted on the latest version of the platform and infrastructure. To ensure that all Salesforce customers are provided with the latest version of the platform, Salesforce performs 3 major releases every year (Spring, Summer and Winter). As a part of all releases Salesforce performs the following activities.   * The release schedule is published in the Salesforce website and all system administrators are notified. * The release notes are published by Salesforce to ensure that all customers are aware of the changes that are happening to the platform. * The new features are made available in Sandbox to ensure that the customers are able to successfully test of out all components of the new functionality before deploying to Production. * The Release time and total downtime is communicated to all customers   Stealth will ensure that all Salesforce platform releases are thoroughly tested before being deployed in Production.  **Solution Update from Stealth:** As a part of the solution building process, Stealth would also deploy patches or upgrades to the Grant Reporting Solution depending on VDSS needs. A patch or upgrade may be deployed when either a bug needs to be fixed or a new module is developed based on requirement needs. In both cases, Stealth will follow a thorough process as listed below to ensure the upgrade to the solution happens seamlessly.   * A demo of the new functionality is built and thoroughly tested in a Sandbox environment. * The new module/functionality is deployed to a full copy Sandbox which is an exact replica of the Production environment and an end-to-end round of testing is performed. * The new module is demonstrated to the key stakeholders to get feedback and implement any last-minute changes. (Steps 1 and 2 are repeated until a final sign off is received from the stakeholders.) * The deployment plan is communicated to all stakeholders and users as needed. * The solution is deployed based on the communication plan developed. All stakeholders are notified of the progress of deployment * Final round of testing is completed in Production to ensure that the solution is working as intended.   Stealth Solutions provides all post-Go Live support for these upgrades. |

# Additional Material – Response to RFP Statement of Needs

Overall Solution

Stealth Solutions proposes the building of the Grant Reporting Solution on the **Salesforce platform**. Salesforce provides a highly secure, highly available, FISMA-compliant, FedRAMP-certified online environment for application development while also providing extensive configuration flexibility and business process automation through a Software as a Service (SaaS) cost-effective model.

Salesforce Overview

The following are some of the key components offered by Salesforce:

* **World-Class Cloud Infrastructure –** Salesforce provides an Infrastructure layer for creating and deploying enterprise-class applications. The applications run on a secure, proven service that scales, tunes, and backs up data automatically. More than 200,000 companies trust Salesforce, including many industry leaders. Salesforce is being used by most state governments across the United States and the majority of Federal departments, agencies, and the White House.
* **Proven Performance –** More than 220,000 applications have been built on this platform that run in accredited, world-class data centers with backup, failover, disaster-recovery, and an uptime record exceeding 99.9 percent. It is documented as enabling applications to be built 5 times faster and at half the cost of traditional applications by an IDC study.
* **Workflow Engine –** Salesforce provides a powerful workflow and approval process engine with which the business rules of the customer can be built quickly and efficiently without the use of any custom code.
* **Reports and Dashboards –** Salesforce provides a powerful drag and drop report builder with which any report can be built in a few seconds. All data captured in Salesforce can be reported on, and analytical dashboards can also be created.
* **Data Security –** Salesforce offers a robust data security model that lets organizations define data security between users. Using a powerful combination of roles, profiles, and organization-wide settings, access to all data inside the system can be controlled seamlessly.
* **Powerful APIs –** The Salesforce platform offers REST, SOAP, and Bulk APIs that are used for seamless interfaces to external systems. These APIs provide programmatic access to an organization’s information using simple, powerful, and secure application programming interfaces.
* **AppExchange –** One of the biggest advantages of Salesforce is the availability of an Enterprise Applications Market where applications are available for quick download (<https://appexchange.salesforce.com/>). Organizations can analyze the apps available on AppExchange to make a Build vs Buy decision.

Solution Components

Stealth Solutions has thoroughly analyzed the requirements provided in the RFP document and based on our initial understanding and analysis, we are proposing the use of the Salesforce platform for building the Grant Reporting Solution as follows:

* Salesforce User Licenses will be used for the 20 internal users to manage grant data, approve time sheets, generate reports, etc.
* A **Salesforce Community** will be configured for the external users (850 users). The users will be able to log in, enter data, and access data as defined by the VDSS.
* The platform will be configured to capture time sheet data and expense reports.
* Approval workflows will be set up for expense reports and time sheets.
* The solution will be configured to capture all grants data as defined in discovery.
* All reports and dashboards will be set up as a part of the implementation process.

| **Response to Statement of Needs** |
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| 1. For the current 2019-2020 program year, the AmeriCorps State Competitive and Formula program portfolios consist of 13 sub-recipients, or sub-grantee, programs operated by 12 non-profit, local government and higher education entities. The number of “Reporting Solution” application users by category are approximated below:  |  |  |  |  |  | | --- | --- | --- | --- | --- | | VDSS, OVCS and Virginia Service Commission staff | Program Directors | Operating Site Supervisors | Service Locations | AmeriCorps Members | | 20 | 69 | 273 | 173 | 340 |   Contingent upon funding, the number of application users is expected to increase as additional sub- recipient programs are brought into the portfolios over the next two program years- 9/01/2020 - 8/31/2021 and 9/01/2021 - 8/31/2022 respectively. |
| The proposed solution built on the Salesforce platform will provide a secure portal for all users stated above. The Salesforce portal will be set up so that users within a subrecipient organization can see information only associated with their organization and not any other subrecipient information. The portal will be configured to ensure the subrecipients can perform all essential functions such as timesheet submission, expense report submission, etc.  Salesforce is a highly scalable platform, and as the number of users increases, additional users can be added in a matter of hours without any performance degradation or infrastructure changes. |
| 1. At a minimum, the “Reporting Solution” must offer the following data management and report capabilities to the Virginia Service Commission: 2. Maintain a repository of up-to-date contact information for program directors, site staff and supervisors, and members; |
| Yes, the proposed solution built on the Salesforce platform will maintain an up-to-date repository of all program directors, site staff, supervisors, and members. All portal users in Salesforce are also stored as Contacts in the system. The Salesforce contact management feature provides the functionality to maintain up-to-date information such as email, phone, address, etc. Salesforce also allows a single sign-on function using which can be synced between Salesforce and the active directory of VDSS.  The following screenshot provides all essential information from the Contacts tab, available out of the box without any customization. Additional fields can be created as needed to capture any custom information desired by VDSS.  Graphical user interface, application, Teams  Description automatically generated |
| 1. Create member records and establish program rosters; Member records will contain personal information; |
| Yes, the Salesforce platform solution allows the creation of member records and establishes program rosters. All personal information about member records will be stored in Salesforce, where data security is of the highest standard. During the implementation, Stealth will ensure the personal information is accessible only to users with the necessary authorizations. |
| 1. Offer a member timekeeping system with authorized user access and digital signatures where members and supervisors can submit hours, view hours served, and balance of hours remaining; Allows levels of sub-recipient program and site location staff to approve/ reject member timekeeping reports; Aggregate information about member hours can be generated. |
| Yes, the Grant Reporting Solution will have an application configured and dedicated to capturing time entry from members and supervisors. The Time Management application on the Salesforce platform will have the ability to:   * Enter the time by members and supervisors; * Provide an approval workflow for the time entered and submitted; and * Provide reports to indicate the total time entered and time remaining.   The following screenshot shows a preview of the time management application that will be configured in Salesforce.  Table  Description automatically generated |
| 1. Generate report of enrollment and exit data of members and other indicators; |
| Yes, the Salesforce platform provides a powerful report builder described in question (i) of this same section. Using the Salesforce report builder, users can generate a report of all members’ enrollment and exit data. The generated report can be exported to a CSV or Excel file as well. The screenshot below shows a sample Salesforce report.  Graphical user interface  Description automatically generated |
| 1. Enter annual sub-recipient program year budgets and submit requests for budget modification to the Commission; |
| Stealth Solutions will work with VDSS to configure a budget application on the Salesforce platform. One of the most significant advantages of the Salesforce platform is the availability of the AppExchange, where many applications are available for quick download and installation. Stealth will work with VDSS and perform a build vs. buy analysis for the budget application and recommend accordingly. If VDSS decides to go with an AppExchange application, Stealth will identify the best-suited product for budget management and install the same. The screenshot below shows an application available for download from the AppExchange.  Graphical user interface  Description automatically generated with low confidence-z |
| 1. Sub-recipient expenditure monthly reporting with current period, year-to-date, and balance remaining displayed; Generate cumulative quarterly financial reports from monthly reporting of subrecipient programs; |
| Yes, the Grant Reporting Solution built on the Salesforce platform can generate monthly expenditure reporting. The report can be grouped by year-to-date, monthly, or current reporting period. Stealth Solutions will work with VDSS to define all reports required for grant management. The end users will also be provided hands-on training to create their reports. For all reports created, charts would also be included.  The following screenshot shows an example of dashboards that can be built using the Salesforce drag and drop builder.  Graphical user interface, application  Description automatically generated |
| 1. Collect submission of financial data and produce reports at the sub-recipient level, and in aggregate by program year and portfolio type, including but not limited to grantee share, in-kind contributions, program income, and leverage/ other revenue; |
| Yes, the Salesforce solution will be set up for subrecipients who would access the Salesforce application using a dedicated VDSS portal. In the portal, subrecipients will perform all operations defined by VDSS, such as submitting financial data. Once the data has been submitted, it can be easily grouped by program year/portfolio type and reported-on fields such as grantee share, in-kind contributions, program income, and leverage other revenue. The following screenshot shows an example of an external/subrecipient portal that would be implemented for VDSS. |
| 1. Collect submission of program data and produce reports at the sub-recipient level, and in aggregate by program year and portfolio type, including but not limited to number and demographic data of volunteers and beneficiaries served by members, number of volunteers mobilized, and number of locations where member hours are being served; |
| Yes, the Salesforce subrecipient portal will be configured by Stealth Solutions allowing specific subrecipients the ability to submit program data. Any data captured in Salesforce can be used for reporting. While generating the reports, the data can be grouped by number and demographic data of volunteers, beneficiaries served, etc. |
| 1. Establish sub-recipient report templates modeled after federal requirements of grantee progress pertaining to program performance measures, outcomes, outputs and impacts, including narrative fields; |
| The proposed solution will be configured so that staff users can define performance measures by goals and objectives. The screenshot below displays an example of how staff can set up a performance measure.      You will notice that fields such as output and outcomes are defined for each measure. Once staff has defined the measures, subrecipients will then submit performance data, including narrative information. Below is an example of performance data collected from a subrecipient.    Collected data can be aggregated by goals and objectives and can be reported on as per Federal Requirements. |
| 1. Enable the monitoring of timely submission of reports by establishing date stamps, author stamps, and approval and rejection details; |
| Stealth Solutions will configure the Salesforce approval and workflow processes. Using this capability, VDSS can:   * Monitor timely submission of reports. If the deadline is missed, an automatic email can be generated to the subrecipient and the internal user as needed; and * Capture all date stamps, such as time of submission, approval time, approval comments, rejection time, rejection comments, etc.   The following screenshot shows a sample approval process that has been implemented in Salesforce.  Graphical user interface, application  Description automatically generated |
| 1. View, print and/ or download program progress reports, financial reports, demographic data, and detailed program information and records at any time with ability to export data into .xls, .csv and .pdf formats; |
| All reports generated in Salesforce can be exported as an Excel or a CSV format. Salesforce offers a printable format of the report which can be saved as a PDF file. If the data should be exported into specified PDF templates, it can also be achieved using Salesforce. The screenshot below shows the options available for exporting reports in Salesforce.  Graphical user interface, application  Description automatically generated |
| 1. Create custom forms or reports as needed; |
| Salesforce offers a powerful reporting and dashboard capability with which all users can create reports and dashboards with a simple drag and drop report builder. All data captured in Salesforce can be created as a report and exported to Excel format if needed. Salesforce also provides a powerful dashboard capability using reports created in Salesforce and can be created as a chart. All users of Salesforce can create their own reports or customize an existing report to meet their needs. As part of the implementation phase, Stealth Solutions will create the required reports and dashboards. We also train all users on creating their own reports and provide the required documentation for report management.  **Salesforce Report Builder**: The report builder screen lets you work with report fields and filters, and shows you a preview of your report with just some of the data.   * Fields Pane (1): The Fields pane displays fields from the selected report type, organized by folder. Find the fields you want using the Quick Find search box and field type filters, then drag them into the Preview pane to add them to the report. * Filters Pane (2): Set the view, time frame, and custom filters to [limit the data](https://help.salesforce.com/articleView?id=reports_limiting.htm&language=en_US) shown in the report. * Preview Pane (3): The dynamic preview makes it easy for you to customize your report. Add, reorder, and remove columns, summary fields, formulas, groupings, and blocks. Change the report format and display options, or add a chart.   The Interactive Report Builder Interface  n image of the report builder, showing its fields, filters, and p  Custom Forms  The Salesforce platform provides a powerful object builder module using custom forms which can be built as required by VDSS. All forms are built using a drag and drop page layout editor, as shown in the example below. The page layout editor allows us to define:   * The fields to be included in the form; * The order in which fields should be displayed; * A grouping of fields in different sections; and * Indication if a field is read-only or required.   Graphical user interface, text, application, Word  Description automatically generated |
| 1. Secure program and financial data, including personally-identifiable information (PII) of members; and |
| Yes, Salesforce will be configured to securely capture and retain all program and financial data, including Personally Identifiable Information (PII). Salesforce provides a robust built-in field-level security model, which will be used to define which users can view and edit which fields in the system. The PII fields will be granted access only to users with the appropriate authorization, and fields will be masked for non-authorized users. |
| 1. Provide a method for communicating between Commission staff and program directors regarding grants administration matters, including notifications, reminders and actions requested from subrecipient programs. |
| One of the most significant advantages of building the Grant Reporting Solution on the Salesforce platform is the ability for users to collaborate amongst themselves using different means, all provided out of the box. Following are examples of how VDSS staff and program directors can collaborate on various grant-related activities:  **Chatter:** Chatter is a Salesforce real-time collaboration application that lets users work together, talk to each other, and share information. Chatter connects, engages, and motivates users to work efficiently across the organization regardless of role or location. Chatter lets users collaborate on specific records such as grant information, timesheet information, etc. In Chatter, everyone has a profile page with a photo and work-related information.  One of the most useful communication tools in Chatter is that users can follow people, groups, topics, files, and records, like grants and expenses. When users follow people, they see their posts, comments, and likes in the “What I Follow” feed. People can follow each other independent of their teams, which helps collaboration across functional borders. When users follow files, topics, and records, they are notified when they change.  Graphical user interface, application  Description automatically generated  **Email Notifications:** Salesforce offers a powerful workflow and email notification engine that allows notifications to be sent to a user. As a part of the initial configuration, all workflow rules and corresponding email notifications are set up. Email alerts are typically triggered by a specific event within a workflow rule (e.g., creation of an expense report) or upon a change in the status of a timesheet assignment (e.g., assigned task has been completed). There is substantial flexibility in the styling and content of these notifications. The body of the email can be configured to include predefined data fields from Salesforce records and VDSS branding. Users can also send emails manually as needed from Salesforce.  **Actions & Reminders:** All Salesforce users are provided the Salesforce Activities module, which includes tasks, events, and calendars. The tasks and events can either be automatically generated for users or created manually. Any task or event associated with a user is displayed in their Salesforce calendar.  Salesforce displays event and task reminders in a reminder window. The reminder window opens whenever a reminder is triggered. When a user logs in, a sound plays if you have reminders that have been triggered since the last time logged in. We can customize reminders in personal settings. The system can also be configured to send email alerts automatically when an event or task is coming up.  All completed activities are stored as a part of the activity history, and reports can be generated on open and completed activities. Calendar views display your events in Salesforce. We can grant access to other users to view or edit your calendar in Salesforce Classic and Lightning Experience.  The screenshot below shows a user calendar in Salesforce that is available out of the box.  Image result for salesforce calendar |
| 1. Maintenance and Support: Support to VDSS and Commission staff on inquiries related to use of the application and features. Rapid response time for troubleshooting any application issues. Automatic revisions and upgrades to the application as released. |
| Stealth Solutions offers Tier 1 and Tier 2 support to address all critical issues. Stealth provides a support management system within Salesforce that tracks all Tier 1 and Tier 2 support requests. The following support types are supported by Stealth and Salesforce for the system, post Go live.   |  |  |  |  | | --- | --- | --- | --- | | **Support Type** | **Method of Support** | **Offered by** | **Type of Issues Supported** | | Tier 1 | Phone/Email | Customer/Stealth Solutions | User Management,  Password Management, Basic System Management | | Tier 2 | Phone/Email | Stealth Solutions | Customization Requests, Advanced System Management | | Tier 3 | Phone/Email | Salesforce | Platform Management, Feature Enablement |   Stealth has resources to provide post-Go Live support. The support resources will assist the VDSS System Administrators with any customization requests or system management tasks. Any tasks that the Tier 1 support cannot perform will be handled by Tier 2. Stealth will work with Salesforce for any Tier 3-platform related support issues like platform upgrade, enabling a new feature, etc. Please note that Tier 2 customizations support is available for an additional cost. |
| 1. Customization and Enhancements: Because the Commission may require modifications to reports and/or additional reports as deemed necessary to effectively manage sub-awards, the “Reporting Solution” must be customizable. For future enhancements, VDSS will submit a written Statement of Requirements to the Contractor who will provide VDSS with a written Scope of Work (SOW) describing the work plan, implementation schedule, number of hours, and a not-to-exceed cost based on the agreed-upon hourly rate. |
| We fully understand that VDSS’s needs will evolve, and Stealth’s Salesforce-based low code solution will support customization without a high cost to VDSS. Moreover, customization within the Salesforce echo system can be turned out quickly in comparison to legacy technology.  Once VDSS issues a Statement of Work, Stealth Solutions will follow a thorough process listed below to ensure the upgrade happens seamlessly.   * A demo of the new functionality is built and thoroughly tested in a Sandbox environment. * The new module is demonstrated to the key stakeholders to get feedback and implement any last-minute changes. (Steps 1 and 2 are repeated until a final sign off is received from the stakeholders.) * The deployment plan is communicated to all stakeholders and users as needed. * The solution is deployed based on the communication plan developed. All stakeholders are notified of the progress of the deployment. * The final round of testing is completed in Production to ensure the solution is working as intended. |
| 1. Training: The Contractor shall offer routine training virtually on the use of the application so as to be accessible to new and returning users. The Commission will be responsible for providing orientation, or start-up, training on the application to its sub-recipient programs. |
| We at Stealth Solutions understand entirely that user adoption is the critical success factor of any project implementation. As a part of all our Salesforce implementations, we provide comprehensive training sessions to ensure that all users are comfortable using the system for the functionalities they need. The training sessions are tailored based on the role of the users and the location of the users. Custom training user guides are also prepared for all training sessions. The following table summarizes the different training sessions provided by Stealth.   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Type of  Training** | **Training Setting** | **Intended Audience** | **Materials Provided** | **Expected Training Result** | | End-User Training | In-Person /Virtual - Hands-on | All internal users  of the system | Custom End User Guide prepared by Stealth Solutions | User should be able to comfortable using all functionalities in Salesforce | | Sys Admin Training | In-Person/Virtual - Hands-on | Identified System Administrators | Custom Sys Admin Guide prepared by Stealth Solutions and Sys Admin guide provided by Salesforce | SysAdmins should be able to maintain the system post Go Live | | Executive Training Session | In-Person Hands-on | Identified Key Stakeholders | Custom End User Guide prepared with more focus on Reporting | Executive team should be able to create reports and get required information from Salesforce | | Recorded Video and FAQ Page |  |  |  |  |   Recorded videos of previously held sessions are also a great resource for returning users. If needed, Stealth will be able to support additional in-person or virtual sessions. |
| 1. In order to be awarded a contract, an assessment will have to be conducted by VITA ECOS based on Supplier’s responses to Appendix B of the RFP, ECOS Assessment Form. Supplier should ensure that when submitting its proposal it has provided sufficient and complete responses to reduce the need for additional information. ECOS Assessment Form can be downloaded at [enterpriseservices@vita.virginia.gov](mailto:enterpriseservices@vita.virginia.gov). |
| Stealth Solutions includes a VITA ECOS Assessment form in Section 3 of this proposal. |