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**Stealth Solutions, Inc.   
Response  
to   
Department of Transportation  
Federal Aviation Administration**

**Office of Aerospace Medicine (AAM)**

**Case and Document Management System (CDMS)**

**Request for Information (RFI) RFI-KG-2023-01**

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# Introduction

Stealth Solutions, Inc. (Stealth) is a Virginia-based SBA certified 8a small business incorporated in 2014. Stealth is a contract vehicle holder for 8a STARS III and GSA’s Multiple Award Schedule (MAS). Key benefit of using the STARS III contract vehicle is the allowance of sole source up to $4.5M per contract order. This allows agencies to lessen their competitive procurement and contracting costs while leading to quicker project implementations.

Stealth understands the requirements for a Case and Document Management System (CDMS) for the Office of Aerospace Medicine (AAM) that provides automated capabilities for tracking, scheduling, and managing inspections, investigations of companies or service agents, investigations into individuals or safety-sensitive personnel, and evaluation of voluntary disclosures reports from companies.  The CDMS functionality would include management of notifying, planning, documenting, and corresponding with industry personnel for all surveillance activities. This includes database data migration from the legacy system into a new database.

The CDMS would allow implementing system process and workflow logic to reduce manual efforts. The system would permit AAM to develop, manage, and update processes, in accordance with AAM’s business practices.  In addition, process analytics will need to be implemented to provide metrics that allow process owners to track performance against process standards.  These capabilities are critical for AAM to optimize its processes.

Based upon these CDMS requirements, Stealth recommends the implementation of AAM’s new Case and Document Management System using the **Salesforce Platform Service Cloud**. Salesforce is an industry-leading Cloud Case Management product with more than 500,000 installations and more than 20 million users. Salesforce is a government-trusted and FedRAMP-certified solution already used by agencies such as HHS, USAID, USDA, GSA, and the Department of Veterans Affairs.

Salesforce provides case management solutions that integrate core Salesforce Software-as-a-Service (SaaS) products: Service Cloud, Community Cloud, and Einstein Analytics.  The Salesforce Case Management solution helps government agencies view all case data and related interactions in a searchable, secure platform. It supports the entire case management lifecycle by integrating critical data points from multiple systems into a single location. With a 360-degree view of every case, service agents can effectively streamline and manage resolution workflows. Constituents have the option to self-serve, finding answers they need without ever having to pick up the phone.

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Examples of Salesforce Case Management solutions include correspondence management, facilities management, grants management, licensing and permitting, inspection management, complaints management, HR service desk, investigative case management, fraud management, and program management.

Advantages of the Salesforce Platform are:

* Inbuilt Service Cloud Module that can be easily configured to meet all business needs;
* Best-in-Class data security – **Fed-RAMP Solution** that can be hosted on Salesforce GovCloud;
* A large Partner ecosystem to ensure system implementation services are always available;
* API integration and prebuilt connectors available for all significant third-party systems;
* Salesforce tools such as chatbots and self-service across digital channels to help government customers find the information and services they need faster;
* A community portal that increases constituents’ interaction and collaboration with the agency, driving greater community safety and satisfaction;
* An Enterprise Applications Market (**AppExchange)** where applications such as document generation and electronic signature are available with out-of-the-box integration with case management; and
* Flexibility of the Salesforce architecture and ability to adapt to changing business processes to deliver innovative solutions to government quickly.

Stealth’s overall corporate capability focus is with Salesforce Case Management System Implementation & Support, Digital Content & Asset Management, Business Processes Assessment, Technical Project Management, and Grants Management Systems Implementation. Our core experience is assisting Federal, State, and local government agencies achieve performance and operational efficiencies. We achieve proficiencies by optimizing business processes, migrating to and implementing Cloud solutions, consolidating and integrating legacy systems to provide a 360-degree view of information on a highly secured Cloud that is accessible from anywhere and using every web-enabled device.

Stealth’s most prominent competency is with Salesforce Case Management System implementation and support. The value proposition with Stealth’s Salesforce offerings can be summarized as follows:

* **One-Stop-Shop –** Stealth offers domain expertise, technical prowess, and proven past performance to address Federal Aviation Administration (FAA) needs. Stealth is a one-stop-shop for FAA to seek business analysis, strategic analysis, technical assistance, training, workflow customization, documentation, architecture review/support, and expert developer services with solid past performances.
* **Low Total Cost of Ownership (TCO) –** Stealth’s experienced staff covering all versions of Salesforce can quickly address the requirements of the FAA using any combination of Service Cloud, Sales Cloud, Community, Salesforce AI, and Analytics implementation on the GovCloud and GovCloud Plus.
* **Lowest Technical and Implementation Risk –** Stealth’s vast experience with implementations across government, similar to FAA requirements, lower your risk of project implementation and support. Our expertise and knowledge of Cloud Services, CRM, Platform, Analytics, and GovCloud significantly reduce the risk of failure for this type of implementation. Also, our hands-on experience integrating with legacy and other third-party systems can smoothly accomplish integrations to other systems.
* **Experience with external systems integration –** Stealth has a strong understanding and vast knowledge of interfacing and integrating with external systems like:
  + Salesforce AppExchange Apps such as Conga Document Generation, Adobe E-Sign, Okta for Single Sign-On, Dun & Bradstreet (D&B) Optimizer, and F-Secure for protection against viruses, trojans, and ransomware;
  + Enterprise Financial Systems such as Oracle, PeopleSoft, and NetSuite by using Salesforce’s extensive API interface capabilities;
  + Workday; and
  + Federal systems such as SAM.gov, Grants.gov, and Login.gov.
* **Best Practices –** Stealth, through its numerous implementations of Case Management Systems and Salesforce implementations, has refined its processes and incorporated lessons learned and industry best practices into deployment processes. The resulting operating processes, when designing a tailored solution, provides Stealth with best practices to standardize processes, workflows, and personas suited for FAA.
* **Reach back to Salesforce –** As an experienced Salesforce implementor and Salesforce partner, Stealth can readily leverage technological know-how and tap into technical resources at Salesforce, which can significantly aid FAA.

Stealth’s key management team personnel have been involved with and certified at various levels of Salesforce for more than 10 years each, and Stealth is a consulting partner of Salesforce. As a Salesforce Consulting Partner, Stealth provides our clients with the expertise to configure, customize, and develop customer-specific applications on the Salesforce Platform like Service Cloud Implementation, Case Management, Customer Relationship Management, Grants Management, Contact Management, Learning Management, Investment 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, so clients 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, 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 Partner in identifying what applications are best suited to migrate to Salesforce and lays out a migration and product roadmap for a Salesforce transition. Stealth also works with clients on process enhancements, data migration strategies, and change management challenges as part of a transition.
* **Stealth’s Salesforce Implementation Services –** As a part of Implementation Services, Stealth provides its clients with the expertise to implement Salesforce to realize maximum value. Stealth provides a team of Salesforce consultants who are certified and experienced in Sales Cloud, Service Cloud, CRM, Tableau CRM/Analytics, Communities, Lightning, configuration, customization, integration, data migration, etc.
* **Stealth’s AppExchange Product Implementation –** The enterprise marketplace available from Salesforce AppExchange provides more than 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 great applications that can be quickly downloaded and installed, many applications provide further configuration options, requiring customization to the core product. Stealth works with clients in delivering the following AppExchange services: Analyze Build vs. Buy; Analyze, Demo, Trial, Evaluate, and Recommend best AppExchange products to meet client needs; and Deploy, Configure, Customize, and Support the selected product.
* **Stealth’s Client Operations Management Program (COMP)** **–** Stealth’sCOMPis a monitoring, maintenance, and 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. In addition, COMP clients have a Stealth 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 FAA AAM Case and Document Management System requirements. This will enable the AAM to focus on customer satisfaction and empower people to drive actions together.

# Experience

Providing FAA with an introduction to some client experiences, Stealth summarizes two examples of our past performance to highlight our flexibility and capability in meeting a wide range of customer case and grants management needs to help them fulfill and advance their missions.

### National Endowment for Democracy Grants Management System

The National Endowment for Democracy is a private, nonprofit organization founded in 1983 and dedicated to the growth and strengthening of democratic institutions around the world. Based in Washington, DC, NED makes approximately 1,600 grants annually to support the projects of non-governmental groups abroad who are working for democratic goals in more than 90 countries.

NED was seeking to migrate from a legacy system that was cumbersome, difficult to maintain, and lacked the necessary integration capabilities they needed to support their grantees by:

* Managing $300M+ in grants focusing on democratic organizations and individuals throughout the globe in approximately 90 countries; and
* Working with 185 internal users and 3000 external users.

Stealth has provided the full set of implementation and project management services to NED as it moved from its legacy system to the Salesforce-based application, GovGrants®.

The project includes supporting the integration, implementation, and testing of multiple applications on the Salesforce platform. The applications include Case Management, Customer Relationship Management, Grants Management, Document Management, and e-signature. Stealth’s key responsibilities included the design and development of the solution and testing for quality assurance of the integrated developed solution. This required expertise in project management, integrated software testing, and user interface testing with quality assurance.

Our team has supported various aspects of NED’s design, configuration, customization, and testing of the new grants management system. This included working with NED to optimize their grants management processes, including workflows, fields/forms, controls, alerts/notifications, document templates, and user dashboards. In addition, we worked with NED to set up a Grantee Portal that allowed for different grantee touchpoints, including application submission, payment submission, reporting, and monitoring, including narrative and financial reports.

Data migration was a major aspect of the implementation as well. The team led the effort to migrate historical data, including template preparation; field mapping, enabling the exports/imports of data; validation of loaded data. In addition, our team worked to integrate GovGrants with several third-party systems, including blacklist watchlist(s), Microsoft Office, and NED’s accounting system (Microsoft Dynamics NAV 2017 Serenic Navigator). The Serenic integration will allow award budget management and electronic payment requests.

### Legal Services Corporation (LSC)

Legal Services Corporation (LSC.gov) is the nation’s single largest funder of civil legal aid for low-income Americans with the mission of promoting equal access to justice. LSC is a hybrid organization receiving both annual appropriations from Congress in addition to being a 501(c)(3) nonprofit organization. LSC grantees provide services in legal areas, including domestic violence, eviction, income maintenance, and disability law.

LSC Benefits from GovGrants

* Centralized all their grants management data into a single system
* Enhanced business processes, workflows, and approvals through automation
* Reduced LSC staff and Grantee time spent on application and application review from weeks to days
* Improved monitoring using a new reporting system

LSC receives around $440M annually through annual congressional appropriation, with $420M in grants distributed in 2019. LSC has eight main grant programs, and they serve 132 grantees, including nonprofit law firms in all 50 states.

Team Stealth provided the full set of project management, technical management, and implementation resources to design, configure, and deploy Salesforce-based GovGrants for LSC. The project team worked across multiple program groups within LSC to consolidate enterprise requirements and establish/codify standards for business processes. Team Stealth was responsible not only for the implementation of GovGrants but also for testing and rollout.

After implementing the GMS (called GrantEase), LSC activated its largest and most complex program (Basic Field Grant) with more than $400M in grant funding. Basic Field supports legal services providers serving low-income citizens across the U.S. In March 2020, LSC received $50M in emergency funding from the CARES Act for the COVID-19 pandemic. GrantEase allowed LSC to rapidly create and activate two new grant programs: The Telework Capacity Grants Program and the Supplemental Formula Grants Program, within 3 weeks.

LSC engaged the support of Team Stealth to easily build a new reports module to create custom reporting required for each CARES ACT grant program in GrantEase. Specifically, LSC was required to track grantees’ use of COVID funding across six reporting cycles every quarter, and this enabled LSC to quickly target the funds where the need was the greatest. Without a robust configurable system like GrantEase, LSC could not have launched the CARES ACT funding programs and targeted funds to grantees needing emergency funding so quickly.

In addition to acquiring new technology, LSC underwent a fundamental business process re-engineering effort, including steering committees, a governance team, collaboration, communication, and planning across the entire organization. As a result, LSC made significant business process improvements, including reducing their Grant Application from 533 questions that a grantee had to complete to an average of 50 questions. This initiative of business process enhancements ensured that LSC did not implement the system using older processes that were inefficient, out of date, and provided less value for the effort expended. The new GrantEase system helps LSC more successfully fulfill its mission.

# Rough Order of Magnitude (ROM)

<<Steve add intro>>

Based on our understanding of SOW and the notional start date of September 1, 2023, we are expecting the DME activities to be completed within the first year and are expected to end by August 30, 2024. The project will move to Operation and Maintenance phase starting year 2 (9/2/2024). Per the SOW, O&M is only planned for 1 year with an understanding that the transition will occur by the end of year 2. Refer to the timeline below for details.



Estimated Cost (ROM)

|  |  |  |  |
| --- | --- | --- | --- |
| # | Description | Low Cost | High Cost |
| 1 | Development, Modernization, and Enhancement (DME) **– Primary Year 1 Activity** | $1,050,000 | $1,400,000 |
| 2 | Operations and Maintenance (O&M) **– Primary Year 2 Activity** | $335,000 | $550,000 |

Assumptions

* ROM is provided for Year 1 and Year 2 only. We have shared a range for the ROM costs as requirements are high-level. We recommend FAA provide additional specificity during the procurement.
* We are assuming the initial build, production rollout, and training to take most of Year 1, and then Year 2 is primarily for operations and maintenance.
* The timeline and cost are based on building the new CDMS system from scratch and migrating the data from the legacy system. If FAA has already started building the new system and is only seeking enhancements, then FAA should provide such clarification during the procurement phase.
* License cost for the underlying platform such as Salesforce is not included and would require FAA to provide an estimated number of users. FAA should assess several estimated internal and external users for procurement.
* All project delivery activities will be conducted remotely from Stealth’s offices.
* Stealth will apply a 2.5% escalation for each option year period.