**EPIC**

**Attachment No. 9 - Phase 1 Offer Questions: Pool 2**

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**Instructions:** Using the same formatting (i.e., do not change the margins, font or font size, line spacing, styles, etc.) of this MS Word document, prepare a response of 700 words or fewer for each of the six (6) questions listed below. Graphics and pictures do not count against the word limitation; however, do not use graphics and pictures to supplement narrative-type information. Submit your responses in MSWord and Adobe PDF format.

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1. How do you ensure that out of the box capabilities should be leveraged first and then look at custom code to meet USCIS requirements? How do you ensure that USCIS is getting the best results out of the platform?

Team TechSur-Stealth will follow the steps below to ensure out of box capabilities are leveraged first before writing custom code:

* Thoroughly analyze requirements and recommend out-of-box modules like case management, SLA, etc. before building custom objects or custom code.
* Leverage the AppExchange: The AppExchange is a marketplace for Salesforce apps and solutions. It can be a great resource for finding pre-built solutions that can help you achieve your business goals without the need for custom code.
* Recommend slight and acceptable modifications to the business processes or requirements to fit the out-of-box capabilities.
* Analyze the cost of custom code development and maintenance and ensure the cost is justified before custom development.
* Utilize Salesforce Accelerators that are pre-built solutions designed to help quickly and easily implement common business processes on the Salesforce platform. The Salesforce Accelerators reduce time to develop and provide cost savings and future proof the implementations.
* Conduct periodic training sessions and brown bags for the citizen development team to educate them on out-of-box capabilities and influence the developers to choose the out-of-box function over custom code.

Team TechSur-Stealth will follow the following steps to ensure that USCIS gets the best results out of Salesforce:

* Constantly analyze user stories and journeys: This will identify areas for automation and enhancements and remove any pain points from the user experiences.
* Build a product roadmap for the ideal state of the application and beyond: This includes all identified automations, integrations, and user feedbacks.
* Constantly monitor Salesforce platform roadmaps and product releases/updates: This will ensure the latest features are being utilized.
* Use Salesforce Lightning Inspector: This is a Chrome extension that allows you to see how users interact with your Salesforce Lightning pages and components. We can use it to identify issues and make improvements to the user experience.
* Run a Salesforce health check periodically: A Salesforce health check is an assessment of an organization's Salesforce instance to identify any issues or areas for improvement. A health check typically involves reviewing the configuration, data, and usage of Salesforce to ensure that it is being used effectively and efficiently. It may also include an assessment of the organization's processes and procedures related to Salesforce, as well as a review of any customizations or integrations that have been implemented.
* Set up Salesforce Center of Excellence (CoE): Team TechSur-Stealth will set up a Salesforce CoE made up of subject matter experts and key stakeholders who work together to define and implement best practices for using Salesforce, and to ensure that USCIS is getting the most value out of its Salesforce investment.
* Regularly review and assess Salesforce usage: Team TechSur-Stealth will monitor the usage and effectiveness of Salesforce on an ongoing basis and adjust as needed. This may involve conducting regular reviews, gathering feedback from users, and analyzing data to identify areas for improvement. The feedback will be incorporated into the product roadmap.
* Always adhere to best practices: Team TechSur-Stealth will ensure to follow Salesforce best practices for configuration, data management, and user adoption to ensure that USCIS is using Salesforce in the most efficient and effective way.
* Analyze usage data: Team TechSur-Stealth will analyze usage data within Salesforce to identify areas where users may be experiencing difficulties or where the user experience could be improved.
* Conduct usability testing: Usability testing involves recruiting users to perform specific tasks in Salesforce and collecting feedback on their experience. This can be done through in-person sessions, remote testing, or a combination of both.

1. How would you create a standardized DEVSECOPS pipeline for the USCIS EPIC platforms? What would be the key milestones?

Creating a **standardized DEVSECOPS pipeline** benefits USCIS by promoting efficiency, reducing opportunity for process errors, and facilitating high-quality and secure code. The EPIC program pursues these goals through the following actions.

* 1. Define a shared DevSecOps platform.
     1. Establish a standard toolset for EPIC including AWS Elastic Container Registry (ECR) for storing and managing Docker images, Jenkins for automating build and deployment processes, SonarQube for static code analysis and quality checking, and Selenium for automated testing.
     2. Develop a consistent nomenclature for environments (such as development, staging, and production) to ensure that there is clear communication and understanding about the purpose and status of each environment and to simplify tracking and audit changes as they move through the delivery pipeline.
     3. Empower CDs through self-service tools and resources to build and deploy applications quickly and efficiently.
  2. Develop an EPIC standard DevSecOps pipeline.
     1. Implement separate pipelines for different environments (development, staging, production) which are orchestrated together for complete CI/CD.
     2. Ensure that each environment has a set of processes and controls, making it easier to manage and track changes as they move through the pipeline.
     3. Define standard stages that each pipeline must follow to ensure all changes go through necessary testing and validation steps before deployment. Common pipeline stages include building code, running unit tests, performing security vulnerability scanning, conducting 508 compliance testing, and promoting code to different environments.
     4. Define common pipeline standards to which platform teams are accountable as a collaborative exercise.
     5. Develop reusable pipeline functions to enable consistent platform operations and provide guardrails that ensure changes are properly validated before deployment. This reduces the risk of errors and ensures that software is reliable and secure. For example, a reusable function might be a script that is used to pull code from GitHub and deploy it to ServiceNow. This function is called and used by multiple teams and projects, ensuring consistency, and reducing manual work.
     6. Build reusable functions for deployment and operation of each platform. Using the previous example, ServiceNow has a deployment manager tool for automating deployments, and Salesforce has a Metadata API for deploying code changes. The Team encapsulates these operations as a function to pull code from GitHub and deploy ServiceNow/Salesforce changes, which are usable in multiple pipelines saving time and effort for developers.
     7. Have platform teams select the functions and processes to be used in their pipelines and ensure usage is consistent with defined standards. This may involve providing parameters or customization options to tailor the pipeline to the specific needs of the team.
     8. Collaborate with the security team and establish audit requirements for each stage to support approvals to advance to the next stage.
     9. Build standards and checks to catch any potential issues before they are deployed to production and ensure that the software meets relevant standards and regulations.
     10. Integrate AI-based visual testing to automatically verify that the appearance of a user interface (UI) meets the expected standards.
     11. Integrate pipelines with USCIS observability toolsets including Splunk for common logging and New Relic for metrics and tracing.
     12. Enable dashboards to visualize key pipeline metrics including performance and task states in different stages of the pipeline thereby identifying bottlenecks in the delivery process. Example metrics include *time for code changes to move through the pipeline*, *success rates of different tasks*, and *number of code changes being processed at any given time*.
  3. To measure progress toward these goals, the Team defines the following **key milestones** in creating standardized DEVSECOPS pipelines:
     1. Identify key stakeholders.
     2. Establish a DevSecOps standard across the platform.
     3. Obtain feedback for DevSecOps standards from stakeholders.
     4. Establish DevSecOps processes and tooling across EPIC platforms.
     5. Establish DevSecOps environments to leverage by platforms.
     6. Create initial pipeline with reusable functions for a pilot platform.
     7. Pilot the pipeline to obtain stakeholder feedback.
     8. Enhance the pipeline for continuous integration and deployment (CI/CD) across the environments.
     9. Obtain security and process feedback for the pipelines including zero trust alignment.
     10. Roll out the pipelines across EPIC platforms.
     11. Measure and optimize the pipelines based on usage (i.e., continuous service improvement or CSI).

1. What would you implement/develop to ensure the performance, security, maintainability, and scalability of the code written within the EPIC platforms is consistent and successful?

Team TechSur-Stealth will follow the steps below to improve Performance of Salesforce Code:

* Use Bulkification Techniques to avoid any limits Salesforce has on the number of records that can be processed in a single transaction.
* Use Async Apex to run long-running or resource-intensive tasks asynchronously. This can help prevent timeouts and improve the overall performance of our code.
* Implement the Salesforce Performance Optimization Checklist provided by Salesforce themselves which is a comprehensive set of best practices for optimizing the performance of our code.
* Always look for ways to avoid unnecessary processing and cache data for easy access.
* Use profiling tools like the Apex Debugger and the Apex Code Profiler to identify and optimize performance bottlenecks in our code.
* Use indexing to improve the performance of database queries. Salesforce allows you to create custom indexes on custom fields to improve query performance.
* Monitor Key Performance Metrics like Execution Time, Number of DML Queries, Apex Governor Limits, etc. for all code written

Scalability:

* Use asynchronous processing techniques to offload long-running or resource-intensive tasks from the main thread. This can help improve the scalability of our code by allowing it to handle more concurrent requests.
* Use the Mashup approach of storing large data outside of Salesforce and making the data available to the Salesforce application as needed.
* Use the Salesforce Platform Cache wherever possible. The Salesforce Platform Cache is a distributed in-memory cache that allows us to store frequently accessed data in memory for faster access. Using the cache can help improve the scalability of our code by reducing the number of database queries and other expensive operations.
* Ensure our design to be “multi-tenant aware” and minimize the use of global variables and other resources shared across tenants

Maintainability:

* Ensure code is always clean and well-structured. We will use clear, descriptive variable, and function names, and organize our code into logical modules. This will make it easier for us and others to understand and maintain your code.
* Write comprehensive unit tests to ensure that our code is working correctly and to make it easier to make changes without introducing new bugs.
* Use comments and other documentation to explain the purpose and behavior of your code. This will make it easier for others to understand and maintain the code.
* Use a version control system like Git to track changes to our code and make it easier to collaborate with others.
* Use continuous integration and deployment (CI/CD) tools to automate the build, test, and deployment process and make it easier to maintain our code over time.
* Use design patterns to create reusable, modular code that is easier to understand and maintain.

Security:

* Use tools like ApexPMD and Checkmarx to automatically scan our code for potential issues and improve code quality. This will also ensure that our code has passed the required security checks.
* Avoid use of Dynamic SOQL queries to prevent SOQL injection attacks.
* Ensure our code is designed to prevent Cross-Site Scription (XSS) and Cross-Site Request Forgery (CSRF).
* Write comprehensive unit tests to ensure that our code is working correctly and to make it easier to identify and fix security vulnerabilities.
* Stay up to date with the latest security patches and updates from Salesforce to ensure that our code is secure.
* Adhere to zero-trust methodologies and adopt all security-related organizational guidance.
* Identify any sensitive information (classified, security-related, personally identifiable, and personal health information) that is handled by Salesforce.
* Design appropriate precautions and security controls into solutions that handle sensitive information.
* Implement periodic or continuous security reviews.
* Require CDs to obtain a minimum acceptable security awareness and to recertify annually.
* Integrate fully with centralized Identity Management systems and require multi-factor authentication (“MFA”).

1. How would you ensure code reuse, reduce code redundancy, and promote repeatable coding patterns?

Team TechSur-Stealth will follow the steps below to ensure all code developed can be reused, reduces code redundancy, and promotes repeatable coding patterns.

**Use Apex design patterns:** Salesforce provides several design patterns that can be used to structure Apex code in a maintainable and scalable way. For example, the Singleton pattern can be used to ensure that there is only one instance of a particular Apex class in memory at any given time. This can be useful for managing shared resources or preventing race conditions. The Factory pattern can be used to create instances of Apex classes without exposing the implementation details of those classes. This can make it easier to change the implementation of a class without affecting the rest of the codebase.

**Use Apex classes and methods for code Reusability:** By writing code as reusable Apex classes and methods, we can ensure that code can be easily reused in different parts of your Salesforce organization. For example, we can write an Apex class to handle all of the logic for creating and updating records in a particular object. This class could then be used by multiple triggers, Visualforce pages, or Lightning Components that need to perform these actions. By encapsulating our logic in a single class, we can reduce code redundancy and make it easier to maintain and debug your code.

**Reduce Code Redundancy by using Methods in Apex Triggers:** Apex methods are blocks of code that can be called from anywhere within an Apex class or trigger. They are used to encapsulate logic and provide a way to reuse code within a class or trigger. By using triggers, we can ensure that our code is executed consistently whenever events occur. By writing our trigger logic as a series of reusable methods, we can reduce code redundancy and make it easier to maintain and test our code.

**Use Salesforce Lightning Components:** Lightning Components are reusable building blocks that can be used to create user interfaces in Salesforce. By using Lightning Components, we can ensure that our code is reusable and follows best practices for UI development. For example, we will create a Lightning Component to display a list of records in a particular object. This component could then be used on multiple pages or in multiple apps within our Salesforce organization. By designing our components to be reusable, we can reduce code redundancy and make it easier to maintain and update our UI.

**Use Salesforce Managed Packages:** Managed packages are reusable sets of Apex classes, Lightning Components, and other resources that can be installed in multiple Salesforce instances. By creating and distributing managed packages, we can ensure that your code is easily reusable and maintainable across multiple instances. When creating a managed package, you can specify which classes and resources should be made public and which should remain private. This can help you ensure that your code is used correctly and that your intellectual property is protected.

**Develop Coding Patterns:** Develop coding patterns or components that are often repeated. For example, develop patterns for common data types like List, Forms, Addresses, etc. and use the same across all objects in Salesforce.

**Train Citizen Developers on Existing Components:** Team TechSur-Stealth will train the Citizen developers on all available components and configurations, thereby reducing the need to develop new components unless required.

By following these best practices, you can ensure that your Salesforce code is reusable, maintainable, and scalable. This can help you reduce code redundancy, improve the efficiency of your development process, and better serve the needs of your organization.

1. Staffing is key to successfully delivering on EPIC. How are you anticipating staffing for this requirement?

Our principles for Pool 2 resource staffing the EPIC program consists of providing a Salesforce-skilled technical, process/business analyst, and resources who focus on user experience to further the Human Centered Design objectives. Additionally, they will liaise between the Citizen Developers and the COE skilled technical experts. Team TechSur-Stealth, supported by our large business, Synergy, will pool resources to best serve the USCIS EPIC Program. Between the three firms we have the capacity, capabilities, and rigorous processes to ensure timely onboarding of resources. Team TechSur-Stealth includes a certified Salesforce Consulting Partner, who has many years of experience staffing Salesforce projects for both cleared government projects and Fortune 100 commercial projects. We are highly effective in supplying Salesforce resources of various skills and experience levels. For example, we successfully supported Salesforce staffing for SBA, USAID, and the National Endowment for Democracy (NED).

**Figure 1** below reflects our team pooled approach for staffing USCIS EPIC program.

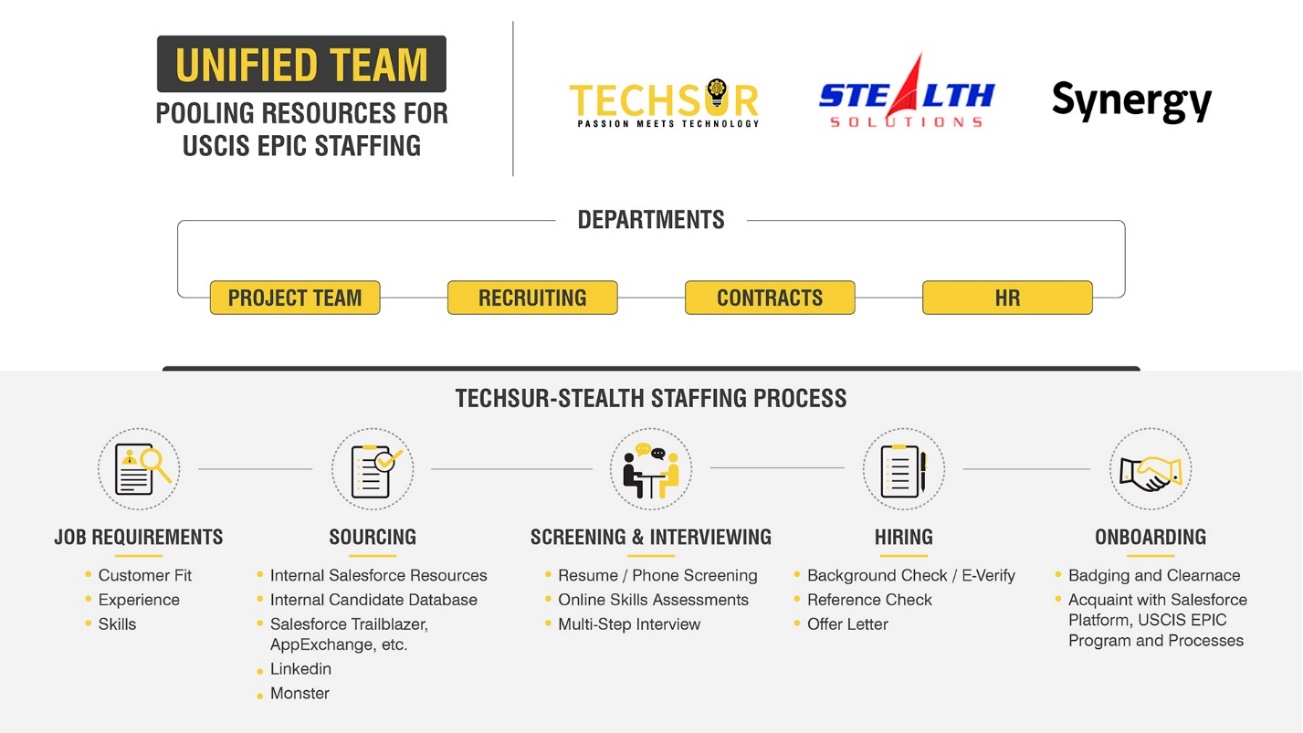


Figure . Unified Team Proposed for USCIS EPIC

Candidates are screened via interviews and hands-on exercises before being onboarded at USCIS, ensuring that candidates have the desired skills and experience for each position. While experts are waiting for USCIS Entrance On Duty (EOD) interim clearance, we conduct bootcamps to familiarize them with USCIS background and EPIC platforms, resources, and standards. Post-COVID, the labor market for Salesforce resources is has shifted towards remote work which made hiring experts easier to utilize expertise across different U.S states. This allows us to expeditiously identify highly skilled, experienced resources with strong Salesforce experience and expertise.

Team TechSur-Stealth views recruiting as a long-term investment with returns demonstrated by high employee engagement scores of 79% vs. 73% (source: Worldnorms Benchmark per recent Qualtrics survey) and lower than industry average turnover rates 15% vs. 16.9% (source: HR 3D). We proactively recruit to nurture our pipeline of talented IT professionals and targeted recruiting sprints to fill specific project needs. We have long tenured, dedicated recruiters who have significant experience sourcing and staffing highly qualified IT professionals. Our dedicated team builds relationships with potential candidates found through sourcing efforts and participation in career fairs, industry days, and Open Houses. We keep in touch via email, social media, and Team TechSur-Stealth-sponsored quarterly networking events to share upcoming opportunities and introduce them to current employees and fellow candidates. This ensures that we have robust, ready candidate pools within our applicant tracking system for better/faster hiring processes.

Our targeted recruiting process starts with skills, experience, and customer/team fit requirements. We first look across our current team members using our HR/talent management system for internal candidates and then look outside our organization, engaging our Recruiting Team to identify qualified candidates from our recruiting database of more than 100,000 pre-screened candidates; employee referrals (which account for nearly 20% of our hires) – incentivized with $2,000 referral bonuses (or more during special drives); and new applicants. We post positions on industry-standard sites (Monster, LinkedIn, Indeed, and Dice) and specialty job boards ([Salesforce Jobs on AppExchange, [Salesforce Trailblazer Community).](https://trailhead.salesforce.com/trailblazer-community/topics/jobpostings)](https://appexchange.salesforce.com/jobs) As needed, we engage our partner network of 15 specialized staffing firms, and/or academic institutions. such as The Johns Hopkins University, University of Maryland, Virginia Polytechnic Institute & State University, and various Historically Black Colleges and Universities (HBCUs) such as Howard University.

Our recruiters work with project leads to screen and schedule interviews with the most promising qualified candidates. We use online skills assessment tools (Codility and Kenexa Prove It!) as needed to verify skill level/coverage. We perform background checks (criminal, work history, and social media) via American DataBank and verify employment eligibility via E-Verify to avoid surprises and lower risks during Public Trust background checks. We make offers within 24 hours and begin onboarding immediately upon offer acceptance, coordinating with Government Administrative Officers on badging and start dates. We prepare the new hire for success by providing read-ahead materials, access to the corporate MS Teams communication platform, and a New Hire Buddy as appropriate. We check in with new hires at 30, 60, and 90 days to assess job fit/satisfaction and solicit feedback to improve our process.

1. Describe your relationship with the platform manufacturer for which you submitted your quote.

Team TechSur-Stealth CTA team is supported by our large business subcontractor, Synergy, which is a Salesforce Certified Consulting Partner.

Stealth Solutions, Inc. (Stealth), a Virginia-based SBA certified 8a small business, is a consulting partner of Salesforce. Stealth provides expertise to configure, customize, and develop customer-specific applications on the Salesforce Platform like Service Cloud Implementation, Customer Relationship Management, Grants Management, Contact Management, Learning Management, Investment Management, and others.

Stealth’s personnel have been involved with and certified at various levels of Salesforce for more than 10 years each. Stealth’s Salesforce team encompasses a mindset to deliver maximum value to clients while transitioning to Salesforce and continued operational support excellence, so client’s 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.

Stealth’s experienced staff covering all versions of Salesforce can quickly address the requirements of the USCIS using Service Cloud, Sales Cloud, Community, Salesforce AI, and Analytics implementation on GovCloud and GovCloud Plus.

Stealth has vast experience with implementations in the same areas USCIS requires. Our expertise and knowledge of Service, CRM, Platform, Analytics, and Gov Cloud significantly reduce the risk of failure for this implementation. Also, our hands-on experience integrating with legacy and other third-party systems can make the integrations be accomplished smoothly.

Stealth, through its numerous implementations of Case Management systems and Salesforce implementations, has refined its processes and has incorporated lessons learned and industry best practices in its deployment processes. The resulting operating processes, when designing a tailored solution, provides Stealth with best practices to standardize processes, workflows, and personas suited for USCIS.

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.

Salesforce Implementation Experience

Stealth has implemented CRM and business management-based grants management systems projects on the Salesforce platform for more than 8 years. The following table provides information on some representative projects.

|  |  |
| --- | --- |
| U.S. Agency for International Development | 1. Implemented Application intake and review processes for powering agriculture on the Salesforce platform 2. Implementing and supporting a Tracker application on Salesforce GovCloud plus for facilitating two-way trade and investment between African nations and the United States. |
| |  |  | | --- | --- | | Logo  Description automatically generated | Text  Description automatically generated with medium confidence | | Text  Description automatically generated with low confidence | Text  Description automatically generated with medium confidence | | NATIONAL ENDOWMENT FOR DEMOCRACY | | | 1. Implementing and supporting Grants Management Systems built on the Salesforce platform and hosted on Commercial and GovCloud. Stealth’s implementation meets the Government’s shift towards configuration-driven, productized solutions, and provides a cost-efficient alternative for agencies who do not need the scope or scale of a traditional, custom-built product. |

Synergy Business Innovation & Solutions, Inc. (Synergy) is an IT solution provider with a 17-year history of providing software development, O&M support, cybersecurity, and system migration/ modernization support to the Federal Government. As an example, during 2022 Synergy worked with multiple federal government agencies, including U.S. Coast Guard USCG), U.S. Department of Agriculture (USDA) and Federal Deposit Insurance Corporation (FDIC) to build solutions using products from the Salesforce ecosystem in which Synergy is a certified Salesforce Consulting Partner.

Synergy’s current Salesforce practice consists of more than 40 Salesforce-certified and dedicated FTEs (Architects, Developers, Implementation Specialists, and Administrators).

As an example of its federal government engagements, Synergy has built Salesforce-based applications at USGC around the Marine Information for Safety and Law Enforcement (MISLE) database. The project makes use of Salesforce’s Public Sector Solutions (PSS). At USDA, Synergy manages the core Salesforce platform (including MuleSoft) and performs O&M and enhancement services for 50+ applications servicing 15 USDA agencies. At FDIC, Synergy is responsible for providing DME and O&M services around 70+ Mulesoft-based APIs that connect 15+ mission-critical transactional and analytical systems including Salesforce.