

**TO: Prospective Supplier

FROM: Kip Smalligan, Sr. Strategic Sourcing Specialist, GVSU Procurement Services Ph: 616/331-3211   Fax: 616/331-3287   smalligk@gvsu.edu |

DATE: August 8, 2022**

 **RE: Request for Proposal # 222-52
 Salesforce CRM API and Data Warehouse Solution**

The Michigan Small Business Development Center (SBDC) at Grand Valley State University is accepting proposals for a Salesforce CRM API and data warehouse solution.

To bid for the services agreement, submit your proposal by e-mail to smalligk@gvsu.edu.
Write **RFP #222-52** in the subject line of your email. Your proposal must be received no later than 5:00 p.m. Friday, September 9, 2022 EDT. No telephone, fax, drop-off, or verbal quotations will be accepted. GVSU is not responsible for late, lost, misdirected, incomplete, or illegible proposals.

Direct all questions regarding this RFP to Kip Smalligan at 616/331-3211 or smalligk@gvsu.edu.

**Instructions:**

1. RFP Schedule:
August 9, 2022 RFP released
September 9, 2022 5:00 pm Proposal submission deadline
September 16, 2022 Proposal awarded
October 2022 Contract Start Date

2. To bid for the services agreement, submit your proposal by e-mail to smalligk@gvsu.edu.
Write **RFP #222-52** in the subject line of your email. Your proposal must be received no later than 5:00 p.m. Friday, September 9, 2022 EDT. No telephone, fax, drop-off, or verbal quotations will be accepted. GVSU is not responsible for late, lost, misdirected, incomplete, or illegible proposals.

3. Should it become necessary to revise any part of the RFP, notice of the revision will be given in the form of an addendum to all prospective suppliers on record as having received the RFP. Any addendum notices will also be posted on the [Bid Opportunities page](https://www.gvsu.edu/purchasing/bid-opportunities.htm) of the GVSU Procurement Services website [www.gvsu.edu/purchasing](http://www.gvsu.edu/purchasing). Each supplier should acknowledge receipt of any addendum in their proposal on the Proposal form (see page 5), but the failure of a supplier to receive or acknowledge receipt of any addendum, shall not relieve the supplier of the responsibility for complying with the terms thereof.

4. It is GVSU’s preference to award this RFP to a single supplier. Grand Valley State University reserves the right to accept or reject any or all proposals.

5. GVSU’s General Conditions can be found [here](https://www.gvsu.edu/purchasing/general-terms-conditions-218.htm).

6. Grand Valley State University reserves the right to accept or reject any or all proposals.

7. Each proposal should be prepared simply and economically, providing a straightforward, concise description of the service, approach, and ability to meet the University’s needs as stated in this RFP.

8. Include all costs to GVSU in proposal. Provide a cost schedule for optional or variable costs.

9. Complete the Proposal Form on page 6 and 7.

10. Suppliers may be asked to make a presentation to the evaluation team.

11. Acceptance of awarded proposal will be made by GVSU purchase order.

12. GVSU’s Michigan sales tax exempt certificate will be made available to awarded supplier.

13. Direct all questions regarding this RFP to Kip Smalligan at 616/331-3211 or smalligk@gvsu.edu.

**Specifications:**

 **Background**

The Michigan Small Business Development Center (SBDC) is a federally and state funded non-profit organization that provides no cost one-on-one consulting and business education training to support the success of small businesses.

Michigan SBDC’s 100 to 150 team members are hosted at ten autonomous institutions across the state, primarily colleges and universities. Each institution has an independent IT infrastructure and unique email domain. Statewide systems, such as the CRM, are managed by the “Lead Center” headquarters hosted at Grand Valley State University (GVSU).

Michigan SBDC is seeking a vendor to implement a Salesforce API and data warehouse solution.
The agreement would be a one to three year contract renewable annually and fulfill the following needs:

• Identify, quote and configure data warehouse solution

* Identify, quote and configure cloud storage systems
	+ Provide options for platform/solution, and assist with identifying best fit for SBDC (i.e. AWS, Azure, Google Cloud, etc.)
	+ Assist with related cloud environment configuration
	+ Create required data warehouse databases, schemas, tables, and stages
	+ Load data from cloud storage system to identified system tables via external stage and Copy
* Export required data models from existing systems
* Export required data from existing systems
* Transmit data from local to cloud storage landing zone
* Establish connectivity between analytical platform and identified system
* [Set up API feeds from Michigan Licensing and Regulatory Affairs Department](https://cofs.lara.state.mi.us/api)
	+ Primary use case: match client records and update LARA information in Account object record fields LARA ID and LARA Filing date
* [Set up API feeds from US Census Bureau](https://www.census.gov/data/developers/data-sets.html)
	+ Primary use case: structure data for comparison with CRM system information for trend analysis/forecasting
* [Set up API feeds from LearnWorlds Learning Management System (LMS)](https://learnworlds.dev/docs/api/ZG9jOjQ2NDA2-introduction)
	+ Primary use case: creating accounts in LearnWorlds based on Contact and Account records for individuals who register for an event in Salesforce. After individuals access courses in the LMS, push LMS course usage data into Event records in Salesforce.

 ○ Notes and proposed process from the SBDC:

* + - Blackthorn.io is used for event management (e.g. registration, tracking attendance, etc.) in Salesforce. “Event(s)” is used to describe a Blackthorn Event record in Salesforce.
		- A single event in Salesforce will be used to gather demographic information from registrants, and push that information to the LMS to create new accounts in the LMS

			* The system will need to recognize when an individual has already registered for the LMS, and already has an account in the LMS, and how to handle the messaging to these registrants (e.g. send email w/ password reset instead of trying to create a new account?)
		- Each course in the LMS will require a unique event in Salesforce to store its corresponding usage date

			* Each event in Salesforce is closed out at the end of the fiscal year and its data is uploaded to the U.S. Small Business Administration. Therefore, each fiscal year, a new Event will be created for each corresponding course in the LMS, and the LMS will need to push usage data into the new corresponding Event.
* Assist with performance testing for remapped analytical use cases
* Knowledge transfer & educational sessions on identified system

**Proposal Requirements are as follows:**

 **Vendor Information**

* Provide Company:
	+ Name, website & resident state;
	+ Contact name, title, phone & e-mail
	+ Complete proposal form pages 6-7
* Provide a summary of the organization’s experience and qualifications.
* Provide resumes of the key team members that will be involved in system management.
* Will you utilize sub-contractors for the implementation and migration of this project?
* Provide three customer references that you have worked with to implement Salesforce within the last three years. Include customer name, contact name, phone number, and email address for each reference.
* Provide cybersecurity policy (policies)
* Provide Cybersecurity Incident Response Policy (Data Breach Policy)
* Provide Cybersecurity Incident (Data Breach) Notification Policy

**Philosophy & Ethics**

* Provide a measurement of client response times
* Provide a summary of preferred client communication methods under a managed services agreement
* Provide a summary of management practices (e.g. agile, SCRUM, waterfall, hybrid, etc.) and tools used for managing the project (e.g. Teamworks, Asana, Airtable, etc.)
* Provide definitions of billable and non-billable hours and how they are managed.
* Provide a summary of how workload is managed during transition and/or vacation periods and how continuity is maintained to eliminate downtime.

**Pricing**

* Provide a summary of fee structures, allocations and models
* Clearly define preferred Terms of Agreement
* Indicate flexibility of preferred terms defined
* Indicate fixed pricing of subscription/ancillary services that recur annually

 **PROPOSAL FORM**

**Salesforce API and Data Warehouse Solution • RFP #222-52**

* 1. The undersigned certifies that to the best of his/her knowledge:

 There is no officer or employee of Grand Valley State University who has, or whose relative has a substantial interest in any contract award subsequent to this proposal.

 The names of any and all public officers or employees of Grand Valley State University who have, or whose relative has, a substantial interest in any contract award subsequent to this proposal are identified by name as part of this submittal.

Name(s) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. The undersigned further certifies that their company \_\_\_\_ IS or \_\_\_\_IS NOT currently debarred, suspended or proposed for debarment by any federal entity. The undersigned agrees to notify the University of any change in this status, should one occur, until such time as an award has been made under this procurement action.
	2. Supplier declares the following legal status in submitting this proposal:

 A partnership

 A corporation organized and existing under the laws of the State of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 An individual doing business as (DBA) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. (Optional) Supplier declares that company is at least 51% owned, controlled and actively managed by (check all that apply)

 African-American Native American Woman/Women

 Asian American Multi-Racial ADA Disabled Person(s)

 Hispanic American

* 1. Supplier acknowledges receipt of the following addenda:

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Addendum No. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Dated \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. BASE PROPOSAL\_\_\_\_\_\_\_\_ATTACH\_YOUR PROPOSAL\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_dollars

($\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)

The undersigned proposes to furnish all labor, materials, equipment, tools and services required to complete the work in accordance with the proposed Contract Documents listed herein, including all addenda issued pertaining to same, for the sum or sums as stated, and agrees that these Documents will constitute the Contract if accepted by Grand Valley State University.

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Company Name

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 Address City/State/Zip Code

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 Office Phone No. Mobile Phone No. Fax No.

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 Authorized Agent Signature Name & Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Witness Signature Name

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 Tax Identification No. Date

VII. ACCEPTANCE: This proposal is accepted by Grand Valley State University

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 Authorized Agent Signature Name & Title

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 Witness Signature Name

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 Office Phone No. Cellular Phone No. E-mail

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 GVSU Tax Identification No. Date