NORTH CAROLINA
OFFICE OF RECOVERY AND
RESILIENCY (NCORR)

Salesforce System of Record Management Services

Request for Proposal RFP 19-RFP-014530WAX

DUE DATE/TIME: March 25, 2019

SUBMITTED TO: Angela Wainright
Purchasing and Logistics
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Raleigh, NC 27603

SUBMITTED BY: Publicis Sapient Salesforce Practice
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March 25, 2019

Angela Wainright  
NC Department of Public Safety  
Purchasing and Logistics Office  
3030 Hammond Business Place  
Raleigh, NC 27603

Re: Salesforce System of Record Management Services, RFP 19-RFP-014530WAX Response

Dear Ms. Wainright:

On behalf of Publicis Sapient, I would like to express our appreciation for the opportunity to present our response to the RFP for development, support and training for the CDBG-DR Salesforce-based system of record for North Carolina Office of Recovery and Resiliency (NCORR).

In this response, we will detail Publicis Sapient’s Salesforce implementation capabilities that have led us to the top in customer satisfaction ratings for implementation partners across the country. We are confident we can provide the ideal solution to NCORR’s technology challenges now and in the future.

As a Platinum-level Salesforce Partner, Publicis Sapient is a leading solution implementer that is 100% dedicated to the Salesforce platform, currently delivering many solutions for various state and local agencies throughout the US, including California, Arizona, Colorado, Florida, Iowa, North Carolina, Ohio, Oregon, Texas, Wyoming and Washington. We have also delivered several hundred solutions that directly enable Public Sector stakeholders. From grants management, customer-facing web portals, and constituent management, to business licensing, inspections and permitting, and adult protective services case management, Publicis Sapient has extensive experience delivering numerous types of customer relationship management solutions, all on the industry leading Salesforce cloud-based platform.

Through careful assessment of these drivers and this RFP, we understand NCORR’s objectives to include the following:

- Provide qualified IT Services for the design and development of a Salesforce-based software system which efficiently implements and monitors the CDBG-DR program in the State of NC.
- Create, maintain and support a data warehouse where other State Contractors and Departments will enter all the fiscal, program, and performance data required for the State’s system of record for disaster recovery.
- Provide support and assist with the ongoing implementation of disaster recovery services in a flexible, scalable, and efficient manner.
To implement a project such as this, Publicis Sapient will assemble a team that has the right combination of leading-edge technology and proven implementation expertise to accomplish and exceed NCORR’s solution goals and objectives.

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We look forward to being considered as a selected partner for NCORR’s Salesforce initiative.

Please contact Jeremy Johnson, at jeremy.johnson@publicissapient or 720-277-1925, with any questions or concerns you may have. Thank you for the opportunity to provide NCORR with this response.

Sincerely,

Ted Battreall
Group Vice President
1845 Folsom Street
Boulder, CO 80302
ted.battreall@publicissapient.com
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Response to Specifications and Requirements

**Specification 1: Ongoing Development, Support and Training for Single-Family and Small Rental Program modules in Salesforce including training state, county, city, contractor staff. This module includes applicant case management services, including application intake, applicant inquiry, eligibility review, duplication of benefits analysis, home inspection management, award calculation, and applicant project closeout. (Single-family module has been initially developed and rolled out, but the small rental module has not).**

RESPONSE:

The Publicis Sapient Salesforce Practice (PSSP) has teamed with members of the original design team for the State of North Carolina’s CDBG-DR recovery programs. Under [redacted], lead the team that assisted the State with its initial Unmet Needs Assessment, Action Plan, and Housing Policy development following Hurricane Mathew in 2016. Also, under [redacted] was the Salesforce System architect for the North Carolina Rebuild NC CDBG-DR data management system. Our team members have worked closely with the State’s Departments of Emergency Management (NCEM) and Commerce (DOC) to develop a customized workflow and data management system that captures relevant applicant data, and State and HUD program requirements with full access for State staff to manage and review grant activities.

The PSSP team also developed and executed the Housing applicant intake training for the State and its County subrecipients. Our team developed the original training modules for applicant intake and job aids. Upon approval of program policies, the PSSP team is prepared to develop training and job aids for all the existing Salesforce functionality currently serving the NCEM disaster management system and is committed to delivering the same level of customized services going forward for these programs.

The PSSP team is prepared to execute the same comprehensive approach for developing and rolling out the Small Rental Program structured to support the Small Rental Program policies once approved. Our teaming partners have worked with other CDBG-DR grant recipients to develop program design and implementation strategies for small rental programs. Our team looks forward to the opportunity to develop out the programs requirements in the Salesforce system using the same program workflow currently utilized in the other Housing Assistance programs. This will include application intake, applicant inquiry, eligibility review, duplication of benefits analysis, home inspection management, award calculation, and applicant project closeout. Customized trainings will be developed for State, County, and contractors implementing these activities.

Publicis Sapient’s Salesforce Practice is a Platinum-level Salesforce consulting partner. Our dedicated Salesforce Practice combines strategy, creative and user experience consultants with deep Salesforce technology skills to drive business transformation. Our Salesforce practice includes 700+ Salesforce consultants, 500+ Salesforce certifications and 1,500+ Salesforce projects.

The team has gained national prominence for our innovative work on the Salesforce platform. Our ability to deliver outstanding results for our clients has led to more 5-star reviews (170+) on the Salesforce AppExchange than any other partner.

Our project methodology, ForwardFast, is highly tuned to rapid, agile, and collaborative Salesforce implementations. Our implementation tool, ProjectForce, is a uniquely customized version of Salesforce that helps us drive projects with consistency and transparency. We have compiled a large catalog of Salesforce solution accelerators that drive speed to value. We offer our accelerators at no fee and no subscription to our clients as part of a project. Together, our skills, approach, and strategy enable us to be regarded as one the top Salesforce consulting partners in the world.
By combining Publicis Sapient Salesforce Practice’s deep Salesforce expertise, proven support center and our teaming partner’s expertise with the State of North Carolina’s CDBG-DR recovery programs we feel we can meet and exceed the State’s requirements by providing a scalable and experienced team.

**Specification 2: Development, Support and Training for Buyout and Acquisition module in Salesforce including training state, county, city, contractor staff. (This module has not yet been developed and rolled out).**

RESPONSE:

Our teaming partners, [insert names], have previous experience designing and implementing CDBG-DR Buyout and Acquisition Programs for the [insert relevant location] in the Salesforce platform. The PSSP team understands the critical components for CDBG-DR Buyout and Acquisition including determining whether activity falls under Buyout or Acquisition, determining eligible homeowners, acquiring HUD compliant appraised values, clear titles, and executing Voluntary Uniform Relocation (URA) forms. The North Carolina system will ultimately be designed to support the approved Buyout and Acquisition Program policies and will link all the critical documentation needed prior to purchase, as well as all closing documents, environmental reviews and clearances, and file closeouts.

The PSSP team will develop all training necessary to implement Acquisition and Buyout program requirements in the Salesforce system. Training will also include training materials and job aids.

**Specification 3: Ongoing Development, Support and Training for Construction Management module in Salesforce including training state, county, city, contractor staff. (This module has been initially developed and rolled out).**

RESPONSE:

The PSSP team through our partners [insert names] have previous experience designing and implementing Construction Management modules in the Salesforce system. The PSSP team understands that a successful construction management module will need to interface with the projects being managed. This module can be customized to the allow Community licenses for construction managers out in the field allowing them to document their activities on site using hand-held devices such as a smart phone or tablet. The PSSP team will design the North Carolina Infrastructure module in conformance with the final approved Infrastructure Policy requirements. Module components can include a construction management checklist, ability to take and store progress photos, and ability to document pay point inspections.

The PSSP team will provide training for all users of the Construction Management module including state, county, city, and contractor staff.

**Specification 4: Ongoing Development, Support and Training for Financial Management module in Salesforce including training state, county, city, contractor staff. Training includes the use of the Salesforce system for financial management and reimbursement submissions, and loading budgets, contract, and vendor submissions into Salesforce. (This module has been initially developed and rolled out).**

RESPONSE:

The PSSP team through has previous experience implementing CDBG-DR financial management systems for multiple clients. [insert name] has implemented CDBG-DR financial management systems for the [insert relevant location] developed budget management and cost tracking for [insert relevant location]. This system tracked budgets and expenditures across the city’s entire portfolio of CDBG-DR activities and integrated General Ledger data from the [insert relevant location] as well serving as a crosswalk to [insert relevant location].
These concepts were adapted to Salesforce for the [redacted] CDBG-DR program. Utilizing these financial tools, the [redacted] has expended over 60% of their grant portfolio and has been monitored annually by HUD. Those monitoring reports yielded 0 findings and 0 concerns with $0.00 in recapture for the [redacted]. This was accomplished by establishing comprehensive QC workflows and checklists that allowed visibility in all areas of costs including reviewing vendors, contracts and expenditures.

The PSSP Team understands the success of Financial Management for the critical component of any CDBG-DR program. The team will continue to support NCORR’s Fiscal Staff and develop additional training materials and job aids.

**Specification 5: Development, Support and Training of the Infrastructure Program module in Salesforce including training state, county, city, contractor staff. (This module has not yet been developed and rolled out).**

**RESPONSE:**

The PS team partners [redacted] have previously implemented a very robust Infrastructure Program module for the [redacted] being administered by the [redacted]. The PS team understands that a successful infrastructure module must be comprehensive and provide a means to include all critical infrastructure data that supports the eligibility of CDBG-DR funded project. The [redacted] model contains the Infrastructure application and eligibility determination for both projects fully funded by CDBG-DR or where the CDBG-DR funds are being used to match FEMA PA or other federal funding sources. The system includes duplication of benefits analysis, grant agreements, and procurement modules for engineers, contractors, and support services. The [redacted] model includes a section for storing and reviewing Davis Bacon payrolls and Section 3 reports and also includes sections for environmental reviews, permits, and construction progress reports.

The PS team is fully prepared to customize the North Carolina Infrastructure module to include any or all of the features listed above based on North Carolina’s infrastructure policy needs. All training for the system will be provided by the PS team and include job aids.

**Specification 6: Development, Support and Training for Residential Relocation Modules in Salesforce, including Uniform Relocation Act (URA) and Voluntary Relocation. (This module has not yet been developed and rolled out).**

**RESPONSE:**

The PS team partners [redacted] have designed and implemented URA and Voluntary Relocation program requirements into prior systems being utilized by the [redacted] administered through the [redacted]. The [redacted] system includes individual tenant information pages, a URA compliant relocation checklist, and document storage. URA award determinations and payments are tracked in the system. The PS team is prepared to customize a similar Relocation module for the State of North Carolina based on the final approved policies for URA and Voluntary Relocation.

The PS team will provide all training to state, county, city, and contractor staff.

**Specification 7: Development, Support and Training of Small Business Program module in Salesforce including training state, county, city, contractor, and CDFI staff involved in the program. This effort includes transitioning the records for the State’s Small Business Recovery Program from an existing system at the Department of Commerce to Salesforce. (This module has not yet been developed and rolled out).**

**RESPONSE:**

The PSSP team partners [redacted] have prior experience designing and implementing Small Business Program modules supported by a Microsoft Dynamics CRM system which is very similar to the Salesforce platform. The Salesforce system will be customized to the State of North Carolina’s Small Business
Program approved policies. The system will support application and eligibility reviews, program awards, and track progress in accordance with the State’s policies. The PS team will provide all training and job aids for state, county, city, and contractor staff.

The PSSP Team will transition the State’s Small Business Recovery Program files from the existing system using our proven ForwardFast methodology and Salesforce expertise to design a best practice module within the existing Salesforce org,

**Specification 8: Development, Support and Training of Compliance Monitoring Modules in Salesforce. This includes compliance monitoring for Program policies and crosscutting CDBG-DR Federal requirements. (This module has not yet been developed and rolled out).**

RESPONSE:

The PSSP team partners [insert name] have successfully designed and implemented a Salesforce based Compliance and Monitoring module for the [insert name] administered by the City of [insert name]. The [insert name] model is designed to monitor compliance during the implementation of projects by including QC checklists at critical decision points during the activity’s workflow process. Utilizing QC loops helps to ensure that at completion a project is ready for a HUD monitoring. The [insert name] system is comprehensive and allows desk monitoring to be completed in the Salesforce system. The Compliance and Monitoring module is also designed to document on-site monitoring by providing document storage of the completed monitoring forms and monitoring reports. The system provides fields to list outstanding findings and concerns resulting from the monitoring and documents when these findings and concerns are closed.

The PSSP team is prepared to customize the State of North Carolina’s Compliance and Monitoring module to support the final approved State of North Carolina’s Compliance and Monitoring Policies and can include any and all of the features listed above. The PSSP team will provide all training and job aids for this module.

**Specification 9: For all the above modules, Vendor shall:**

A) Provide general Salesforce system support for system-wide updates due to additional natural disasters and policy and procedure changes

RESPONSE:

Our proposed team includes onsite and remote resources to help identify, gather, design, deploy and support NCORR’s Salesforce solution. We intend to use our deep Salesforce experience and subject matter expertise of NCORR’s programs to architect a declarative solution that allows for updates to be quickly applied. This includes looking at the solution as a whole while addressing the needs of individual programs. Please see our response in Specification 13 regarding our ForwardFast Methodology.

B) Develop and support the generation of program performance reports using Salesforce data uploaded and available in Salesforce for the above modules as follows:

1. Reporting functions shall provide executive-level production status reports on every State program module developed for this RFP (e.g., single-family home repair, buyouts, relocation, infrastructure, multifamily housing). These reports will be developed with NCORR to clearly and efficiently inform number and status of applicants or projects related to approval, implementation progress, timing, and award obligation.

2. Additional program module roll-down reports need to provide program management and operations-level reporting that reflect the next level of information to support identification of incremental
3. A case manager report shall provide a clear detailed summary of individual application or project information related to next-step processing and additional support documentation requirements so that applicants or project managers can quickly and effectively identify where they are in the program process and what is needed to proceed.

RESPONSE:

The Salesforce Platform includes a powerful suite of analytics and reporting tools to help you view and analyze your data. Salesforce analytics consists of several integrated parts:

**Reports.** A report returns a set of records that meets certain criteria and displays it in organized rows and columns. Reports are stored in folders, which control who has access. To help you monitor your organization, Salesforce offers a wide range of standard reports, accessible in the standard reports folders on the Reports tab. All our standard reports are "templates" so they can be used as report starting points from which users can alter fields, criteria, etc. and use the "Save As" function to easily capture a version more specific to their unique needs. Users can also create new custom reports to access exactly the information they need. Report Builder is intuitive and user friendly. There is no need for IT support or advanced scripting capabilities to run reports. View a short (2:33) video on how to use the Report Builder in Salesforce: [http://www.salesforce.com/_app/video/chatter/help/report_builder.jsp](http://www.salesforce.com/_app/video/chatter/help/report_builder.jsp).

**Dashboards.** A dashboard shows data from source reports as visual components, which can be charts, gauges, tables, metrics, or custom Visualforce pages. They provide a snapshot of key metrics and performance indicators for your organization. Administrators control access to dashboards by storing them in folders with certain visibility settings. Dashboard folders can be public, hidden, or restricted to groups, roles, or territories. If you have access to a folder, you can view its dashboards. To view a dashboard component, users need access to the folder for the underlying source report. Each dashboard has a running user, whose security settings determine which data to display in a dashboard.

Two other important points about dashboards:

First, dashboard components are not simply nice-looking, static pictures. They are live, actionable objects. You can click on a dashboard component to drill down to the underlying report that generated it and click on any item in that report to drill down to the source data. So, you can quickly understand the reasons behind the results.

Second, dashboards are full participants in Salesforce’s enterprise social collaboration platform. For example, a manager could post a dashboard snapshot to their Chatter feed to share it with their "followers", or to a specific Chatter group, along with comments, so that they can find answers, congratulate team members, or issue calls to action. And both dashboards and Chatter are available on mobile devices, as well as PCs.
PSSP will work with NCORR to define specific requirements that can be met with Salesforce’s powerful analytics functionality.

| 4. **Limited system interface may be needed or developed to align with State financial management and grants reporting functions held in other discreet secure systems. The goal is to provide effective application and project status that both informs program budgeting priorities and reflects obligation and expenditure of projects.** |

RESPONSE:

Salesforce includes a robust API architecture as well as data import tools which can be leveraged to export and import data from external State systems.

PSSP recommends leveraging MuleSoft as the middleware tool to connect Salesforce with the State’s back-end systems and 3rd party APIs. This accelerates implementation by leveraging MuleSoft’s pre-built connectors with Salesforce and other databases as well as web-service endpoints and gives the State the most flexibility by making integrations configuration-based while providing additional functionality such as logging and alerts. Mulesoft provides NCORR:

- API-Led Connectivity which creates reusable assets for system integration and business logic, reduction in domain expertise needed for integration, 2-4x increase in time to market and developer productivity.
- Reduces time and cost to act on initiatives to provide real-time data and improve connectivity with a variety of backend systems and Salesforce
- Remove the liability of point to point integration, and introduce a single-platform for connectivity, API development, API management, and maintenance services.

PSSP will work with NCORR to understand the detailed interface requirements and recommend the best approach to fit within NCORR’s budget.

| **State system users with designated levels of reporting access should be able to automatically generate all reports in the system at any given time.** |

RESPONSE:

PSSP will help define and maintain the proper Salesforce security profiles to give users the necessary access to view, create and update reports using Salesforce’s out-of-the-box report and dashboard features.

PSSP can also control access to reports and dashboards by storing them in folders. Folders can be public, hidden, or shared.

| **C) Coordinate with other disaster recovery program and data-set managers (e.g., NFIP, FEMA IA, FEMA HMGP, SBA, private insurance) to import data into the Salesforce system.** |

RESPONSE:

Most projects Publicis Sapient completes include a data migration component. As a result, we have developed a robust and repeatable data migration methodology based on best practices that produce predictable results and minimize errors, risk and cost associated with this activity. Publicis Sapient will use our proven methodology...
and partner with you to create a comprehensive Data Migration Plan that will meet your data migration requirements.

The following graphic depicts our methodology and recommended approach.

Each step in the process is explained in detail below.

Planning

Publicis Sapient Salesforce Practice (PSSP) will work with NCORR to identify the data that will be migrated. It is often not necessary to migrate old and outdated data; however, it is important to consider the importance and types of data that should be migrated. For instance, you may not need to migrate data that is outdated, related to an obsolete division or of a specific status.

PSSP will partner with you to develop a Data Migration Plan that reflects the goals and priorities of your project and organization.

It is often the case that data will be migrated to Salesforce from a legacy application that will be deprecated after a successful Salesforce launch. It is also common that data migration is required to populate Salesforce with historical data from a third-party system where that system will have a real-time integration with Salesforce. In these cases, the integration strategy will be carefully considered when developing the Data Migration Plan.

Objects may have mandatory relationships; for example, in Salesforce, all accounts have an owner and all opportunities are associated with an account. The dependencies in these object relationships dictate the sequence of the data conversion. It is best practice to start by loading data in parent objects and continue migrating data into child and grandchild objects so that the record level relationships can be established when the data is loaded.

PSSP will identify the dependencies by examining the data model and identifying the object relationships, then determine the correct order of operations for the Data Migration.

Analyzing and Mapping

Data mapping is a crucial step in the Data Migration process. It is extremely important to make sure that the mapping is done correctly, especially when there is a large number of fields that is being mapped.

Data types will need to be considered when designing the solution. For example, depending on how the data is to be used within the application, it is important to ensure that date, time, number, email address, phone number, and hyperlink fields have the correct type and conform to the specifications of that field type in Salesforce.

Extraction From Source

PSSP’s standard practice is to extract data from source systems two different times during the course of a project. Data will be extracted during the build phase of the project so that the test environment can be populated with migrated data. This provides an opportunity to test the mechanics of the data migration process and allows the State to validate the migrated data in a test environment. A second extraction and data migration will be performed immediately prior to system launch.

While PSSP can assist NCORR with extracting the data from existing systems, many of our clients prefer to do this work themselves as they already have in-house resources that can perform these functions. Using these resources can help to reduce direct costs.
Data Cleansing and Transformation

PSSP will provide NCORR with templates for each type of data that is to be migrated. In PSSP’s experience, this is the best way to prepare the data to be migrated and to ensure that the data is mapped to the correct fields in Salesforce. This method also provides a convenient format for cleansing data, ensuring all required transformations have been completed.

Our normal practice is to empower and support our clients in the cleansing and transformation process. Because our clients understand their data better than PSSP, they actually prefer to do the cleansing and transformation themselves. If this is not the case, we would be happy to explore alternatives that would better serve the needs of your organization.

PSSP will provide you with an .xls or .csv formatted template for each object. For objects that have multiple record types, it may be necessary to prepare a template for each record type. The templates will indicate:

• Required fields for each object.
• Legacy System ID (foreign key) fields to create a permanent reference between the legacy system record and the Salesforce record. This will help you build custom reports to validate the migrated data. Optionally, the field can be designated as an External ID field that will be indexed.
• Comments on the fields that will be used to establish relationships to other records. For example, there could be separate Account and Contact templates, and the Account Name field in the Contact file should match the Account Name field in the Account file in order to ensure that the data is properly related post-migration.
• Field Type indicators to ensure that data can be properly cleansed to match the data validation rules that will be enforced in Salesforce. For example, email addresses and Date fields need to be verified. If the fields in the templates are not formatted properly, the import will fail with errors.

Below is an example of a case import template with some sample fields. In practice, the template would have more columns and include all standard and custom fields on the object.

Although it is NCORR’s responsibility to perform the data cleansing and transformation in the templates, PSSP will provide proper guidance to ensure the process goes smoothly. Allocating time for data transformations and cleanup is a critical step in delivering a quality solution; PSSP will support you at every step along the way.

Importing into Sandbox

PSSP will use the completed templates to perform a test import containing a sample of records from each object into a Salesforce sandbox (test environment). It will document the results of the test and work with you to resolve any issues that are identified during the test upload. Once all of the errors are corrected, PSSP will load all of the records, share the success and error files with you, and invite you to validate the data in the test environment.

Validation

PSSP takes tremendous pride in its work and will always validate its deliverables before asking you to test. Ultimately, you know your data best, and it is critical to project success that NCORR take the lead in validating the test data migration. There is no substitute for the trained eye of a subject matter expert reviewing the results of a data migration.

If any issue or errors are identified, the PSSP team will develop a resolution plan and ensure that the Data Migration Plan is updated to incorporate the process changes that will be required to ensure a successful Production Data Migration.

Importing into Production

Immediately prior to going live, NCORR will run a second extraction of legacy system data, re-populate the templates and perform any necessary transformations. PSSP’s team will load the data in the Production environment and request that NCORR spot check the results.
Specification 10: Development and maintenance of a tracking system in Salesforce for system user training on data security, specifically the protection of personally identifiable information (PII).

RESPONSE:
Please see our response for Specification 15 for details about our training approach.

Salesforce provides a free Class Enrollment AppExchange app that can be leveraged to track user attendance for all training. More information can be found here [https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000016aVIEAY](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N300000016aVIEAY). In addition, PSSP has a training and certification tracker as part of our VIP accelerator library that can be leveraged free of charge. Optionally, NCORR can leverage Salesforce’s MyTrailhead license which provides learners with an on-demand, gamified platform customized with NCORR’s brand and content. More information can be found here: [https://trailhead.salesforce.com/mytrailhead](https://trailhead.salesforce.com/mytrailhead)

PSSP will leverage existing training materials regarding protecting PII within the Salesforce solution based on NCORR’s configuration of Field Level Security and encrypted fields.

Specification 11: Vendor shall provide Support Staff who can address technical and programming issues, program design needs and reporting functions as follows:

Vendor shall provide Support Staff who can address technical and programming issues, program design needs and reporting functions as follows:

A) Develop with the State a protocol for State agency staff and vendors using the Salesforce system regarding requests for routine system updates, testing, and support for system-user technical issues during weekdays and weekends;

B) Respond within four (4) business hours for most requests for routine system updates and support for system user technical needs. Provide weekly reports on the types and nature of issues served to identify any needs for training and/or system modifications;

C) Coordinate with the State on anticipated current system needs and solutions, and develop protocols and schedules for addressing any system-wide, module design modification or report design modification requests in a reasonable time frame to support ongoing program activity and needs;

RESPONSE:
Publicis Sapient Salesforce Practice recognizes that support services play a vital role in the success, adoption, and perception of the Salesforce solution by our clients. Without effective support, the project go-live excitement may quickly fade, adoption erodes and IT and operations staff are left ill-equipped to deal with ongoing maintenance and enhancements.

With this in mind, PSSP offers a wide range of support options to meet client needs and complement the platform support provided by Salesforce. To help provide the highest level of customer satisfaction, PSSP support features include:

- Our team will troubleshoot, evaluate and resolve technical defects that may arise in production.
- More than break/fix, PSSP support includes enhancements.
- A structured methodology that includes a path for both “hot fixes” and agile monthly enhancement releases.
- All resources are Salesforce certified.
- A structured kickoff that reviews our Salesforce Community and the Service Request Process.
- Monthly status with a detailed accounting of all support requests.

The PSSP support team will manage all support requests, coordinate the configuration, testing and release to NCORR for user acceptance and approval to release to production. This team will collaborate with the assigned PSSP delivery team for knowledge transfer of your solution.
Our typical support model provides for weekday-only support from 8:00 a.m. to 8 p.m. EST but PSSP will work with NCORR to understand weekend support requirements and staff accordingly.
D) Provide weekly onsite support for State staff in the Raleigh, NC area. Prior to performing onsite work, the Vendor shall be responsible for submitting all logistics requests regarding the onsite visit, including but not limited to office space, desks, telephones, network connections, parking, and phones to the State Contract Manager for approval. The Vendor shall be responsible for providing both on-site and remote logistics planning.

RESPONSE:

Please see our response for Specification 14 for details about our proposed team.

Specification 12: Vendor shall manage and maintain Salesforce user licenses, as needed (e.g., distributing licenses to users, tracking license distribution, utilization, and renewals). NCORR will purchase, as needed, Salesforce program licenses and other programs or licenses that permit the Salesforce environment to operate, including data storage.

RESPONSE:

PSSP will leverage Salesforce’s standard license tracking and distribution tools within the NCORR Salesforce org. This allows PSSP to see all active and inactive users along with their associated security profile, permission sets and assigned license. Using the Service Request process detailed in Specification 11 above, NCORR users can request for a user license or security setting to be provisioned or removed.

Specification 13: Vendor shall supply a plan to complete work items to be approved by the State Contract Manager. Starting immediately after the Contract is awarded, the Vendor and the State Contract Manager, or their designee, may hold weekly status meetings via conference call. The Vendor shall provide a detailed update on the Project’s status and all outstanding issues currently being addressed by the Contractor. At the end of each weekly status meeting, the Vendor shall prioritize the list of issues at the direction of the State Contract Manager. Vendor shall submit weekly Project progress reports to the State Contract Manager. These progress reports must contain all important Project activities for the previous week, and outline goals for the following month. If necessary, revisions and updates to active Project plans will be communicated with this status report.

RESPONSE:
Agile / Discipline Paradox

While agile methodologies like ForwardFast allow flexibility on design based on user feedback, they are actually more disciplined in adherence to time-boxed schedules and ceremonies than traditional waterfall projects. Agile leverages the power of time-boxing to keep projects on schedule and ensure teams are motivated and focused with their efforts.

Working Software Focus

In ForwardFast, working software is the primary measure of progress. Focusing the team energy on building and testing a potentially-shippable increment of working software, and away from writing stacks of documentation, accelerates delivery.

Salesforce as a platform has declarative tools that make design self-evident to system administrators, reducing the importance of exhaustive documentation as system settings and configurations are changed. Agile projects focus on standing up an “MVP” (minimum viable product) before adding supporting features. The MVP approach provides a working product earlier in the project, which allows users and testers to provide better feedback to the development team.

ForwardFast Lifecycle

ForwardFast follows distinct phases for project delivery: Activate, Innovate, Build and Adapt:

Activate Phase

The Activate Phase is about introducing the teams, aligning on the methodology, scope and initial project plan, and getting started on the Discovery / Analysis activities. Key Activate Phase ceremonies include:

Planning

Once the SOW is approved, PS assembles a team of consultants with appropriate skill sets and experience for each project role. The PS team will review the RFP, SOW, scope and client expectations with our Engagement Manager.
Kickoff
We schedule a project kickoff meeting with the client to formally launch the project. This provides the opportunity to introduce our Salesforce certified consultants who will be working on the project, and for us to get to know your team. We encourage you to invite key project stakeholders including the project sponsor and executive team, subject matter experts and process owners.

Spotlight workshops:
Following kickoff, a series of Transformation Spotlight workshops are focused on client sponsor vision, end user personas, journeys and the end user experience from the “outside looking in”. Goals of the Spotlight workshops include:

• Understanding current pain points, business drivers and success factors
• Understanding needs of a broad cross-section of personas
• Defining expected user interactions with the application
• Starting to design the user experience commensurate with the vision of the program

Business Process Review (BPR) workshops:
The aforementioned Spotlight Workshops inform a series of Business Process Reviews (BPRs). This is where we dive into the client’s as-is process in detail to identify pain points and opportunities for automation. This results in the mapping of business process flows, and discussion around optimization to those processes for the future.

Process owners and key subject matter experts (SMEs) should be invited to participate in the workshop as appropriate. On completion of the BPR, the client’s business process will be documented using a cloud-based flowcharting tool.

Requirements
Following agile principles, requirements are drafted in the form of User Stories. A user story is a functional description of a software feature from an end-user perspective. This includes both a statement describing the business benefit provided to the user, as well as specific Acceptance Criteria by which the user story can be tested. User stories are mapped to the aforementioned BPR process flows, and are organized into a hierarchy of Legend / Epic / User Story / Subtask.
Innovate Phase

The Innovate Phase is all about functional and technical solution design. The PS team processes all input discovered during the Spotlight and Business Process workshops to arrive at a design recommendation and presentation. The resulting requirements and design elements are then prioritized by the client product owner and considered along with dependencies in planning the initial sprints of the Build Phase.

Generally, the Innovate Phase includes the following ceremonies:

Solution Design

The Solution Design presentation describes the functional and technical architecture. This artifact describes the high-level system components and business processes required to implement client’s requirements. It also defines the object model, user processes, automation techniques, data management, third party partners, and any other system design considerations.

Database Design

Salesforce is a relational database that comes with a standard object model that can be expanded to include custom objects as the solution requires. Our solution architect designs this and provides a high-level ERD along with our Solution Design presentation and deliverable. The data model shall be scalable, supporting all business processes with appropriate level of customizations (click vs. code), while considering performance for large data volumes.

User interface Design

The aforementioned Spotlight workshops for UX/UI design inform Journey Maps and wireframes for key pages within the application. These are presented with the overall Solution Design and reviewed by developers in Sprint Planning and execution.

Reporting Design

Salesforce offers flexible Report and Dashboard features to summarize and bring data to life. The solution architect can also consider Salesforce offerings such as Wave, or Salesforce AppExchange products for presenting data. The architect will also consider the desired performance level (SOQL queries, reports) given customer’s large data volumes. However, on most projects, reporting requirements can be met by configuring Salesforce Reports and Dashboards out of the box without the need for custom code or third-party tools.
Gap Analysis
The prescribed solution design and its level of effort are compared to the original budget and scoping for the project. The PS project manager and governance lead will present any gaps between the SOW and requirements scope, along with recommendations for prioritizing the work.

Prioritization
Once the Gap Analysis has been completed and the client has given their approval to proceed, the client product owner works with the PS solution architect and project manager to prioritize the backlog of requirements. While the client's business priorities will be the main driver for this prioritization, the PS solution architect will also advise on technical dependencies to consider. This exercise results in a plan for the first few sprints of the upcoming Build Phase.

Release Planning
The PS team will recommend an overall program/project schedule that aligns with your business needs. Project Iterations of 2-3 weeks in length will be defined with high level dates and objectives for each iteration, but the details will be defined immediately before the start of each iteration. We will track and report progress for each iteration throughout the project.

Build Phase
The Build Phase is where the iterative development process starts. Key Build Phase ceremonies include:

Backlog Grooming
Each week, the client Product Owner, along with the PS project manager and solution architect, will meet to review a set of user stories that the team expects to develop in the upcoming sprint. The goal of this ceremony is to answer any questions the developer may have about the user story or its acceptance criteria, so that the story is ready for development once that next sprint starts. This is an opportunity for the client product owner to collect open questions and seek answers from business stakeholders.

Sprint Planning
On the first day of each sprint, the entire team gathers to review both the Sprint Goal determined by the client product owner, as well as the set of user stories identified. This is another chance for developers to ask clarifying questions. The PS project manager assigns subtasks for each story to team members, while being mindful of team member skills and capacity. The result of this meeting is a Sprint Backlog, or set of stories, that the team commits to deliver over the 2- or 3-week sprint ahead.

Daily Scrum Meeting (Stand Up Meeting)
The Daily Scrum is a 15-minute huddle for the development team, typically in the morning. Each team member takes a turn to describe their progress since the last stand-up meeting, their plan for the day ahead, and calls out any risks or impediments to progress. The Scrum Master watches team velocity and remaining capacity and rebalances work across the team if necessary. The Scrum Master also seeks to remove obstacles for the team completed its sprint commitment.
Sprint Review
At the end of the 2- or 3-week sprint, the team and meets with business stakeholders and sponsors to demonstrate their work. The goal of this presentation and demo is to seek understanding of the solution and to obtain feedback on the solution from end users. Input received is entered into the product backlog for consideration by the client product owner for future sprint development.

Sprint Acceptance Testing
Following the Sprint Review, stakeholders and client testers are invited to get their hands on the solution in a QA environment. This testing team has the following weeks to review and ultimately accept the sprint. Client testing following each sprint is critical to ensure expectations are being met, and to mitigate risks and misunderstandings from piling up at the end of the project.

Sprint Retrospective
Following each Sprint Review, the development team gathers to discuss what worked well, and what areas require improvement in how the team operates. The team typically votes to settle on a single area of focus for the subsequent sprint.

Adapt Phase
The final project phase includes testing, training, deployment and support. Adapt Phase ceremonies include:

Final User Acceptance Test (UAT)
Final UAT is conducted by the client to ensure the end-to-end solution supports valid business scenarios. These tests follow real business scenarios using real data. Each scenario may cover multiple user stories and solution components. Final UAT determines readiness for deployment to production.

Training
Training Goals include teaching end users to perform daily functions, and teaching administrators to configure the application to meet the needs of the users. The format and schedule for these sessions varies by client and is often part of an overall Organizational Change Management initiative.

Deployment
Seamless transition from legacy to launch of the new product. Deployment Goals include:

• Execute data cleansing and data migration
• Deployment of solution environment
• Testing and validation for successful deployment
• Test roll back strategy
• Internal and external communication

Post-Deployment Support
A Salesforce implementation is just the beginning. Once the program is live, end users and stakeholders will think of new ways it can expand to maximize value and return on investment for your business. Support Goals include a stable and reliable application and continuous enhancement.
Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.

PS offers the option of OnDemand post go-live support. This involves an assigned OnDemand Administrator who provides a single point of contact for all your support needs, whether it be configuration, development, testing, or education. This gives our clients the flexibility to use time as needed to get fast, expert answers to questions, technical issues and more.

Project Governance
Steering Committee
PS will establish a Steering Committee for leaders from both the client and PS side in order to monitor risks, discuss relationship health, and identify any issues in need of resolution. The committee will meet on a monthly basis at a minimum. Publicis Sapient will involve the Governance Lead, Engagement Manager, and the PS Project Manager. We recommend the client invite an Executive Sponsor, Product Owner, Client Project Manager and any other relevant stakeholders.

Status Reporting
The PS project manager will provide a weekly status report in writing to the Client Project Manager and Product Owner. The weekly report will include the percentage of completion for each User Story, the pass rate for User Story Tests, key Project delivery milestone status, estimated completion date for each milestone, as well as other information relevant for the delivery of the Project as may be agreed upon between the parties. This report will track action items and escalations between the Publicis Sapient Scrum Master and Client Project Manager and Product Owner. A weekly project status call will be setup between the PS PM and Client Project Manager to review the content of the weekly status report.

Tools
Publicis Sapient recommends that our joint project teams use Vertigo, The PS customized version of Salesforce.com, for sprint planning, User Stories, issue, and defect tracking. The team will mutually agree to tools for document management, source control, collaboration and other support functions during the course of the Project.

Vertigo is a comprehensive management tool built on the Salesforce platform that links everything together for easy access, collaboration and tracking. Clients are provided credentials to Vertigo through our PS Salesforce Community portal, providing real-time visibility into your project including requirements status, project issues, defects and support requests. Salesforce Chatter is a communication tool similar to Facebook news feed that allows for real-time streaming of comments, incorporated into The PS Vertigo to enable real-time collaboration on requirements, defects, risks, and tasks.

Project Success Factors
- Executive sponsorship
- Understand that Agile requires changing the way everyone thinks and works
- Business and IT committed to the organizational changes to create delivery excellence
- Dedicated business subject matter experts engaged through the duration of the project
- Colocation; team rooms, projectors, whiteboards, travel budgets to facilitate collaboration
- Team members must feel safe to be transparent and accountable
- Track to goals on a regular basis
- Make decisions about priorities swiftly
- Emphasize communication

Specification 14: Vendor shall demonstrate its qualifications to accomplish the above objectives by providing resumes for all proposed staff in the Proposal. If there are any proposed staffing changes between the Proposal and the execution of the Contract, the State shall be provided the opportunity to review the recommended staff changes, including resumes. If the State informs the Vendor that it is not satisfied with the recommended substitute employee or the performance of any employee on the Vendor’s staff at any time, Vendor shall replace the individual with an equally or better qualified employee as quickly as possible, working with the State to affect a satisfactory transition. Should the Vendor need
to replace an employee assigned to the Contract, the Vendor shall notify the State and the State reserves the right to reject replacement staff.

RESPONSE:

About Publicis Sapient

Publicis Sapient is a digital transformation partner helping established organizations get to their future, digitally-enabled state, both in the way they work and the way they serve their customers. We help unlock value through a start-up mindset and modern methods, fusing strategy, consulting and customer experience with agile engineering and problem-solving creativity. As digital pioneers with 20,000 people and 53 offices around the globe, our experience spanning technology, data sciences, consulting and customer obsession – combined with our culture of curiosity and relentlessness – enables us to accelerate our clients’ businesses through designing the products and services their customers truly value. For more information, visit publicissapient.com.

We are also widely recognized by industry analysts. Gartner named Publicis Sapient as the #1 leader in digital transformation for the past three years. Forrester has also proclaimed that we “lead the pack” as a Digital Experience Service Provider.

Our Salesforce Practice

Publicis Sapient’s Salesforce Practice is a Platinum-level Salesforce consulting partner. Our dedicated Salesforce Practice combines strategy, creative and user experience consultants with deep Salesforce technology skills to drive business transformation. Our Salesforce practice includes 700+ Salesforce consultants, 500+ Salesforce certifications and 1,500+ Salesforce projects.

The team has gained national prominence for our innovative work on the Salesforce platform. Our ability to deliver outstanding results for our clients has led to more 5-star reviews (170+) on the Salesforce AppExchange than any other partner.

Proposed Team

The following roles are being proposed:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Onsite Salesforce Consultant/PM  | • Conduct requirements and solution design workshops.  
                                  • Facilitate business process analysis and automation discussions.  
                                  • Advise and guide NCORR toward best practices in application configuration considerations such as security model, mobile deployment strategies, workflow, data validation and analytics.  
                                  • Author solution design and configuration specification deliverables.  
                                  • Configure Application.  
                                  • Conduct the Train The Trainer sessions in conjunction with NCORR.  
                                  • Coordinate multiple work efforts, ensuring NCORR’s business objectives across all projects are met.  
                                  • Manage onsite and offsite PSSP resources to ensure quality, completeness, timeliness of all tasks.  
                                  • Conduct and document project status meetings and reviews.  
                                  • Evaluate NCORR priorities and execute change control process to ensure the NCORR’s needs are met.  
                                  • Manage budget, schedule, and deliverables on a weekly basis. |

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CDBG/Grants Program</strong></td>
<td>• Coordinate vision and execution across multiple project to assure alignment with client vision and consistency of design and execution of work efforts.</td>
</tr>
<tr>
<td>Solution Architect SMEs</td>
<td>• Work with business owners and Solution Architects and Consultants to craft a solution that optimizes salesforce.com for the client's business environment.</td>
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<td></td>
<td>• Provide subject matter expertise with the salesforce.com application and process automation that aligns with business needs and objectives.</td>
</tr>
<tr>
<td><strong>Disaster Recovery/HMGP</strong></td>
<td>• Provide policy and programmatic guidance related to federal disaster recovery programs to include Housing and Urban Development Community Development Block Grant Disaster Recovery (CDBG-DR), the Federal Emergency Management Agency's Hazard Mitigation Grant Program (HMGP) and other Disaster Recovery Act programs.</td>
</tr>
<tr>
<td>SME</td>
<td>• Advise the development team on understanding supporting business processes to enable the design and implementation of the System of Record and inform the team on relevant business rules to successfully remain in compliance with the federal guidelines associated with the funding grant.</td>
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<td></td>
<td>• Advise on the development of test scripts to test all functionality related to associated business rules and/or objects.</td>
</tr>
<tr>
<td><strong>Solution Architect</strong></td>
<td>• Work with business owners to craft a solution that optimizes salesforce.com for the NCORR's business environment.</td>
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<td></td>
<td>• Lead visioning conversations during requirements workshop.</td>
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<td></td>
<td>• Evaluate requirements and review and approve solution design.</td>
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<tr>
<td></td>
<td>• Conduct requirements and solution design workshops.</td>
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<tr>
<td></td>
<td>• Facilitate business process analysis and automation discussions</td>
</tr>
<tr>
<td></td>
<td>• Provide subject matter expertise with the Salesforce application and process automation.</td>
</tr>
<tr>
<td><strong>Technical Architect</strong></td>
<td>• Team Lead for the salesforce.com integration and customization.</td>
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<td></td>
<td>• Provide timeline and resource management for the integration implementation.</td>
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<td></td>
<td>• Author the technical design specification.</td>
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<td></td>
<td>• Manage overall development, validation, and deployment plans.</td>
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<td></td>
<td>• Review code to ensure it conforms to Salesforce best practices.</td>
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<td></td>
<td>• Provide best practices guidance to NCORR technical team.</td>
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<tr>
<td><strong>Salesforce Developer</strong></td>
<td>• Contribute to key deployment documentation.</td>
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<td></td>
<td>• Develop custom code.</td>
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<td></td>
<td>• Assist NCORR with legacy data extraction, cleaning, and scrubbing.</td>
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<tr>
<td></td>
<td>• Assist NCORR with data mapping from legacy to Salesforce systems.</td>
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<tr>
<td></td>
<td>• Import data, sampling and validation.</td>
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<tr>
<td></td>
<td>• Unit testing and error handling.</td>
</tr>
</tbody>
</table>

PSSP will work with NCORR on any replacement of staff.

Please see the attached resumes for our recommended team.

**Specification 15:** Training for all modules shall include job aids and/or Power Points with screen shots that can be used for onboarding and training of new staff. Training may be provided onsite at NCORR headquarters, in field locations, or through webinars.

**RESPONSE:**

Successful transfer of knowledge and appropriate training on the use of the solution is critical to any adoption of a new solution. PSSP believes in utilizing a range of training options to facilitate adoption of the project. As part
of our training methodology we work closely with your team to build an intuitive design using Salesforce best practices to create a user-friendly experience that increases adoption across NCORR. PSSP will collaborate with NCORR’s training department to coordinate the training program and provide documents to facilitate the training experience.

We recommend NCORR designate key end-user personnel (“Super-Users”) who will be sufficiently trained in the solution to update and maintain the new products, perform post-launch maintenance and support, as well as be technical enough to train their team members on the nuances of the new solution. These single points of contact for internal users should be adequately knowledgeable to answer basic user questions and address day-to-day issues and concerns. As a best practice, PSSP recommends that key End Users and the Administrators participate in the project from the earliest point possible.
We compile all of this information into our Curriculum Map, which is an outline of the training modules we would intend to build including listed formats they would be available in. The Curriculum Map can be thought of as a Training Outline. It intends to structure the training courses around the future processes. We do not begin curriculum development until the Curriculum Map has been approved.

Attend User Acceptance Testing – During Validation Phase

Our curriculum development resource will typically attend User Acceptance Testing as a chance to learn the types of questions users ask. They will use this time to better understand end-users at an organization. This will allow our resource to best understand how to prepare realistic training scenarios.

Pilot Training (Optional) – During Validation Phase

Once User Acceptance Testing ends we prefer doing a Pilot for our training materials. We have learned that UAT testers are usually focused on making sure the system works, rather than thinking about how the system will actually be used. Pilot Training is a chance for users to demo the training with our Super Users and Executive Sponsor. We will use the feedback to improve the training materials before end-user training.

Train-the-Trainer (Optional) – During Deploy Phase

Once we are done remediating our training approach, we will be ready to start Train-the-Trainer. While the participants are typically our Super Users, we also open this up to other members of an organization.

End-User Training – During Deploy Phase

We will ask a Super User to attend all training sessions whether they lead the session or not, to support overall business process questions and present them as Resources for after training questions or concerns.

Training Options

The following training options are available as part of your implementation. PSSP can customize each training to fit your needs:

• Train the Trainer
• Direct End-User Training
• Administrator Training
• Salesforce Online Self-Paced Training

Train the Trainer

At the NCORR’s request, PSSP will “train-the-trainer,” with the intent that these individuals will be adequately knowledgeable about the solution to train NCORR users. PSSP has extensive experience in preparing trainers to deliver end-user training. PSSP will deliver training materials, configuration guides (if needed), and user manuals/tip-sheets to enable the trainers to successfully deliver training to their end-user groups. Upon completion, staff members will be capable of delivering successful end-user training. Our training resources are experienced classroom facilitators, who believe relevant hands-on practice of daily tasks is instrumental to quick adoption of a new tool. PSSP will create custom training materials to address the unique needs of NCORR business process. Where possible, PSSP will leverage existing materials and customize them for the NCORR project. The materials delivered will be in the form of PowerPoint presentation for instructors.

Direct End-User Training

Direct end-user training will be conducted in groups of 15 focused on an experiential understanding of the application.

Administrator Training

Administrator training will be delivered directly from PSSP to administrators. PSSP will prepare a configuration guide specific to this project to assist with the transition to Administrator. Training will be hands-on with the Administrator and the configuration guide is expected to be an aid to completing online exercises.
Salesforce Online Self-Paced Training

Salesforce incorporates the training resources and best practices as part of their subscription service. We intend to leverage these resources to augment our standard training options.

MyTrailhead

Optionally, NCORR can leverage Salesforce’s MyTrailhead license which provides learners with an on-demand, gamified platform customized with NCORR’s brand and content. Additional license costs from Salesforce may apply. More information can be found here: https://trailhead.salesforce.com/mytrailhead

All training materials will be created in English only.

**Specification 16: Vendor shall supply all equipment or devices needed to accomplish specifications defined herein.**

RESPONSE:

It is assumed that NCORR is responsible for course logistics for all onsite training. All training facilities will include projector, screen (or equivalent), whiteboard (or equivalent), and high-speed internet access for the instructor machine and participant machines. Participants must provide their own laptops. NCORR is responsible for duplication of materials. NCORR is responsible for ensuring participants attend the provided sessions. The cost of printing and shipping any materials is the responsibility of NCORR.

**Specification 17: The State has obtained all necessary licensing for the system. It will be the Vendor’s responsibility to obtain and maintain software, licenses, or other tools/equipment as needed to provide work product deliverables and services in a manner that meets the capacity and needs of the State.**

RESPONSE:

PSSP is passionate about building innovative government solutions. We believe that government technology assets should be shared to limit spending while increasing innovation. Unlike other vendors that try to inflate profits by charging different agencies for the same solution over and over, we have a “Pay It Forward” program that gives agencies access to any of our prebuilt solutions at no charge, assuming they allow us to share solutions built for them with other agencies. This allows us to implement the solutions at substantially lower cost than other providers. Because they are built on the Salesforce platform, the solutions evolve with technological change, and aren’t prone to becoming obsolete during maintenance updates. In addition to lowering the cost of implementation, this also means there will be no ongoing costs for third party software above and beyond Salesforce.

Our Pay it Forward model includes a large catalog of solution accelerators to jump-start your Salesforce project. Also known as our VIP accelerators, these are production-proven packaged functionality. They range from single function widgets to full blown solutions.

The VIP accelerator assets are built 100% natively on the Salesforce platform. Our consultants will deploy the right solution into your org and tailor it, if needed, to your unique business requirements. Our solutions come with no subscription fees as part of a PSSP project.
The full library of accelerators can be found here: http://vip.vertiba.com/

**Specification 18: Preference may be given to Vendors that can provide subject-matter expertise in CDBG-DR to support the specific objectives above.**

RESPONSE:

Publicis Sapient’s Salesforce Practice is a Platinum-level Salesforce consulting partner. Our dedicated Salesforce Practice combines strategy, creative and user experience consultants with deep Salesforce technology skills to drive business transformation. Our Salesforce practice includes 700+ Salesforce consultants, 500+ Salesforce certifications and 1,500+ Salesforce projects.

The team has gained national prominence for our innovative work on the Salesforce platform. Our ability to deliver outstanding results for our clients has led to more 5-star reviews (170+) on the Salesforce AppExchange than any other partner.

![Listing from the Salesforce AppExchange](image)

Our project methodology, ForwardFast, is highly tuned to rapid, agile, and collaborative Salesforce implementations. Our implementation tool, ProjectForce, is a uniquely customized version of Salesforce that
helps us drive projects with consistency and transparency. We have compiled a large catalog of Salesforce solution accelerators that drive speed to value. We offer our accelerators at no fee and no subscription to our clients as part of a project. Together, our skills, approach, and strategy enable us to be regarded as one the top Salesforce consulting partners in the world.

By combining Publicis Sapient Salesforce Practice’s deep Salesforce expertise, proven support center and our teeming partner’s expertise with the State of North Carolina’s CDBG-DR recovery programs we feel we can meet and exceed the State’s requirements by providing a scalable and experiences team.
Resumes

Our team of experienced individuals include individuals with extensive Salesforce technical and project experience, as well as several subject matter experts with in-depth knowledge of grants management and the State of North Carolina internal agencies. We recognize the importance of an on-site Salesforce consultant/project manager, and will commit a team member who has the necessary knowledge and experience to lead the project to success.

Some of our proposed team members include:

[Blank space for resumes]
Erin O'Keefe
Senior Salesforce Consultant
Publicis Sapient

Project Role
Responsibilities
Salesforce Consultant
Conduct requirements and solution design workshops. Facilitate business process analysis and automation discussions. Advise and guide Clients toward best practices in application configuration considerations such as security model, mobile deployment strategies, workflow, data validation and analytics. Author solution design and configuration specification deliverables. Configure Application.

The Trainer sessions in conjunction with Client.

Relevant Project Work

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Industry</th>
<th>Project Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arizona Land CRM and Licensing Management</td>
<td>Government</td>
<td>11/14/2016 -</td>
</tr>
<tr>
<td>LA Metro TAPforce Phase 2 Implementation</td>
<td>Government</td>
<td>04/24/2017 - 10/31/2018</td>
</tr>
<tr>
<td>DIR: Labor Commission License and Permits</td>
<td>Government</td>
<td>06/01/2017 - 08/03/2018</td>
</tr>
<tr>
<td>TX OAG Peace Officer Forms</td>
<td>Government</td>
<td>03/12/2018 - 07/16/2018</td>
</tr>
<tr>
<td>WYO: State Lands Permitting/Inspections App and Community</td>
<td>Government</td>
<td>02/27/2017 - 06/30/2018</td>
</tr>
</tbody>
</table>

Erin is a dedicated, creative, technology-minded leader with a knack for building and improving business operations and leading projects to success. She has proven and unmatched experience in CRM governance and project management. She is highly organized and detail-oriented with strong verbal and written communication skills. Erin's positive energy and ability to coordinate and collaborate across teams makes her a valuable asset to the PS SP team.
<table>
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</tr>
</thead>
<tbody>
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<td>Government</td>
<td>02/12/2017 - 06/30/2018</td>
</tr>
<tr>
<td>CO Adult Protective Services</td>
<td>Government</td>
<td>09/19/2016 - 09/29/2017</td>
</tr>
<tr>
<td>WYO Medicaid Customer Service</td>
<td>Business Services</td>
<td>11/08/2016 - 05/12/2017</td>
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<tr>
<td>CDHS, APS HHS Grant Change Order</td>
<td>Government</td>
<td>12/01/2016 - 05/08/2017</td>
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<tr>
<td>OH Adult Protective Services</td>
<td>-</td>
<td>02/06/2017 - 03/24/2017</td>
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<tr>
<td>TX Atty Gen SF Custodial Death Rev2</td>
<td>Government</td>
<td>06/24/2016 - 08/06/2016</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Previous Work Experience</th>
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</thead>
<tbody>
<tr>
<td>Bluewolf</td>
<td>Senior Business Analyst</td>
<td>2012 - 2014</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Education</th>
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<tbody>
<tr>
<td>Armstrong University</td>
<td>BA, English Communications</td>
<td>2005</td>
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<td>New York University</td>
<td>Music Business</td>
<td>2010</td>
</tr>
<tr>
<td>Ohio State University</td>
<td>BA, Communications</td>
<td>2008</td>
</tr>
</tbody>
</table>
Christopher David
Grants Solution Architect

Core Qualifications
- Executive Team Leadership
- Strategic Solutions to Regulatory Impediments
- Trained in Dispute Resolution
- Project Management
- Grant and Proposal writing
- Policy and Compliance Oversight and Procedures
- Public Outreach and Communication
- Staff Training and Development

RELEVANT PROJECT WORK

State of North Carolina Department of Emergency Management
CDBG Disaster Recovery Program, February 2017 – Present
Under Hagerty Consulting, Mr. David served as a Management Consultant and Subject Matter Expert to the State of North Carolina in its efforts to recover from Hurricane Matthew in 2016. Mr. David was embedded with the North Carolina Emergency Management (NCEM) to assist with Action Plan Development, Program Design, Program Startup and Implementation of the CDBG-DR funded ReBUILD NC program. Mr. David developed and is managing the State's central system of record using the Salesforce platform. The system functions as a central data and document management platform for all of the CDBG-DR funded the Statewide recovery program. The system is designed to support Housing, Infrastructure, Business CDBG-DR Grants across multiple counties and vendors. The system is also designed to support centralized fiscal and administrative management including contracting and procurement.

Boulder County Collaborative
CDBG Disaster Recovery Program, April 2015 – Present
Under Hagerty Consulting, Mr. David is currently serving as a management consultant to the Boulder County Collaborative (BCC). BCC is a first of a kind multi-jurisdictional collaborative that was formed to assist the communities within Boulder County to recover from the Floods in 2013. BCC has brought together Boulder County and 6 individual jurisdictions to leverage their collective resources to expedite the recovery process. Mr. David has developed a centralized workflow and document management system that will allow BCC partners, the State of Colorado and other stakeholders to centralize data and documents using the Salesforce platform. The system manages all aspects of BCC's recovery program including procurements, project data, budgets and draws. The system is also designed to work with HUD's financial and reporting software Disaster Recovery Grant Reporting (DRGR). HUD has recognized the system and the BCC model as a best practice stating: "The Collaborative appears to be a model method for units of local government to combine resources and identify a high-capacity lead agency to administer recovery programs on behalf of the collaborative participants. The city of Longmont's administration is strengthened by its adoption of a central grants management system using the Salesforce product platform." The city's database includes key data on project status, monitoring efforts, and supporting documentation for draw requests. The system is also set up to be consistent with the DRGR action plan and import data that can be pulled from DRGR.

City of New York Office of Management and Budget
Under Hagerty Consulting, Mr. David served as a Management Consultant and Subject Matter Expert to the City of New York in its efforts to recover from Superstorm Sandy. Mr. David was embedded with the city's Office of Management and Budget (OMB) to assist the CDBG-DR Task Force and serve as a Disaster Recovery Management consultant and Subject Matter Expert for their CDBG-DR program. Mr. David served as a consultant project lead for developing a cloud based data management system for OMB. The system served as a central processing center for expenses related to the City's $4.2 Billion of CDBG-DR grant funds. The system also worked as a bridge between the City's central accounting software, NYC Financial Management System (FMS) and HUD's DRGR System. Mr. David assisted the city throughout the entire Software Development Lifecycle (SDLC) including project scoping, system development, deployment, staff training, operations and maintenance.
Ardurra Group | Data and Reporting Consultant

October 2016 – July 2017

CDBG Disaster Recovery Program, October 2016 – July 2017

Under Ardurra Group, Mr. David served as a data management and reporting consultant to the South Carolina Disaster Recovery Office (SCDRO). SCDRO is managing the State of South Carolina's CDBG-DR recovery program from the flooding caused by Hurricane Joaquin in 2015 and Hurricane Matthew in 2016. Mr. David is serving as data management and reporting lead for the program's construction operations.

CDM Smith | Disaster Recovery Information Management Lead

March 2010 – April 2013

Mr. David was the information technology lead for CDM Smith's CDBG Funded Disaster Recovery projects. CDBG funded programs require rigorous compliance with federal and state regulations and require technology solutions to help meet those requirements. Mr. David has served as a business systems analyst and solutions architect to develop and deploy various technology solutions. Those systems have streamlined and helped manage processes like applicant eligibility review, lead and damage assessments, historic and environmental review, benefit selection, bid, change orders, draws and construction management. These solutions have given full visibility into processes for all stakeholders as well as giving program management tools for reporting, gap analysis, aging and task ownership. Solutions allow internal and external monitors review program files. Tools like these have been key to meeting tough program deadlines while keeping the program within federal, state and local compliance. Projects include:

City of Galveston & Harris County, TX CDBG Housing Recovery and Rehabilitation Programs, March 2010 – March 2012

Mr. David developed several custom data management solutions to support program operations. Solutions included systems for expediting and coordinating grant processing, subcontractor management, change order and contractor invoice processing. These solutions worked in tandem to augment capabilities of the Intelligrants solution.

Mr. David has worked directly with subcontractor Agate Software, Inc. to oversee the completion of the Intelligrants document and data management solution including managing deployment schedules, user acceptance testing, test cases and user training.

State of Illinois, “IKE” CDBG Disaster Recovery Program, August 2012 – Present

Mr. David's versatile skillset allowed him to serve as a Grant Manager on the State's Economic Development and Community Stabilization Programs. Mr. David administered these programs which included grants and loans to private businesses as well as construction of infrastructure projects. Mr. David assisted with project eligibility reviews, environmental reviews, procurement, developing grant agreements, grant administration, payment requests and financial management. Working with program stakeholders, including program managers and sub-recipients, Mr. David also streamlined and improved processes, project tracking and moved projects from application to closeout.

Automation Specialist, Various Projects, March 2013 – August 2012

Mr. David worked with CDM Smith's Automation division to provide his experience with IT and data management systems on various projects. Working with Automation staff, Mr. David provided support during the design and implementation of SCADA systems for various Water and Wastewater Treatment Plants whose systems are now more reliant on IT infrastructure including Networks, Firewalls and Active Directory Domains and Security Models. Mr. David also led efforts developing VBA based solutions leveraging complex data structures working alongside existing legacy SCADA, new SCADA systems and other data sources.

Education

Texas Tech University, Lubbock, Texas | May 2006

• Bachelor of Science, Electrical Engineering
• Bachelor of Science, Computer Science
• Minor, Mathematics
Deb Siefert
Grants Solution Architect

Core Qualifications
- Executive Team Leadership
- Strategic Solutions to Regulatory Impediments
- Trained in Dispute Resolution
- Project Management
- Grant and Proposal writing
- Policy and Compliance Oversight and Procedures
- Public Outreach and Communication
- Staff Training and Development

RELEVANT PROJECT WORK

Disaster Recovery Management
Principal Consultant/CEO, Siefert Management Solutions 2018 - present
Ms. Siefert launched Siefert Management Solutions in the Spring of 2018 to pursue unique opportunities within the Disaster Recovery field of services. Ms. Siefert is currently engaged in the ongoing CDBG-DR program support for the Boulder County Collaborative in Longmont, CO; providing strategy solutions for the State of North Carolina to implement its CDBG-DR with the State’s Emergency Management Division; and developing in-house CDBG-DR compliance and quality control for a major housing contractor in the Houston-Galveston area.

Director of CDBG-DR Recovery, Hagerty Consulting 2013 - 2018
New York City CDBG-DR Oversight
Ms. Siefert came to Hagerty Consulting in early 2013 to start the CDBG disaster recovery (CDBG-DR) line of business for the firm. Hagerty had won the contract with the City of New York to manage its FEMA assistance after Hurricane Sandy. Hagerty was also interested in assisting the City with the $4 billion allocation of CDBG-DR funds allocated by the Department of Housing and Urban Development (HUD). Ms. Siefert was brought onto the New York City project and quickly began to strategize with the City’s Office of Management and Budget (OMB) regarding their oversight responsibilities under HUD disaster funding. Working with the OMB staff to develop efficient and manageable oversight of the CDBG-DR funds which were dispersed through various divisions within NYC government. Ms. Siefert helped establish both staff and mechanisms for tracking expenditures and drawing reimbursement funds from HUD.

State of Colorado - In 2016, the State of Colorado issued a request for proposals for disaster management firms to develop a strategy to assist them with monitoring oversight of their Pilot Watershed Resiliency and Capacity Building program. Challenged with over 50 CDBG-DR grant awards to small nonprofit watershed restoration organizations awarded subrecipient agreements, Hagerty presented the winning strategy for flexible and efficient subrecipient monitoring and technical assistance.

State of North Carolina - The State of North Carolina engaged Hagerty Consulting in February 2017. The State had just been awarded $198 million of CDBG-DR funds and needed subject matter expertise in developing a recovery strategy for the funds to be implemented through the States Emergency Management Division of the State. Ms. Siefert lead the team

Over 20+ years of specialized knowledge in disaster management and environmental policy. For the past 12+ years specializing in CDBG Disaster Recovery management and implementation. Extensive experience in developing strategies to help disaster impacted communities and States fund complex multi-million-dollar projects that factor in resiliency and environmental sustainability. As practice lead for Hagerty Consulting’s CDBG-DR practice, Ms. Siefert has brought in over $5 million dollars of consulting business over the last 4 years. Ms. Siefert proposed and won the recovery work for Boulder County and launched an innovative “collaborative” approach for the County which won them the over $60 million dollars in a sub-allocation and allowed the County to self-direct its recovery needs without going through other traditional State grant award procedures. Prior to managing disaster recovery programs, I worked in Washington D.C. as an expert in international trade and environment policy and actively participated in the ISO 14000 International Environmental Management Systems Standards as an environmental non-governmental organization (NGO) leader.
in developing and submitting an Action Plan to receive the funds from HUD, setting a coordination structure between the State’s Emergency Management and Department of Commerce to seamlessly transition from implementation to reimbursement for HUD. Ms. Siefert developed a 2-day training for the newly hired case managers and housing center staff to complete application intake and eligibility reviews for homeowners utilizing the customized workflow and data management system. The training was very successful, and the centers opened and began taking applications on the third day. At the end of the first week of operations, there were over 300 applications in the system.

CDBG Disaster Program Manager, CDM Smith, 2009-2013

Ms. Siefert lead the CDM Smith team Program Manager for the $67 million CDBG-DR flood recovery project in Minot, North Dakota (2012-2013) and as Housing Manager for over $100 million Hurricane Ike funds in Texas (2009-2011). Projects included leading client strategy meetings on program development and implementation, staffing and training housing center staff, ensuring files were complete and compliant with HUD requirements. Other responsibilities included writing Action Plans and reports for submittal to HUD, developing policies and procedures, creating training material and job aids for approximately 50 staff, and monitoring activities.

General HUD Program Management Experience

Grants Manager, City of Arlington, Arlington, Texas, 2004-2006

Ms. Siefert managed a 16-person staff administering HUD entitlement funding for CDBG, HOME, and ESG Programs. Activities included housing, infrastructure, public facilities, economic development, and homeless grants. Ms. Siefert met with developers and elected officials to plan innovative approaches to utilizing HUD grants. Ms. Siefert was responsible for all reporting and compliance requirements including developing the Consolidated Plan, Annual Action Plan, Environmental Review, Housing inspections, IDIS, CAPER, Davis Bacon, and Fair Housing.

Environmental Experience

HUD Environmental Review and Clearance. Ms. Siefert was responsible for all HUD required environmental clearances for infrastructure, public facilities, housing, and public service activities for both Tarrant County Texas and the City of Arlington Texas for 6 years. Duties included obtaining release of millions of dollars in funding from HUD, implementing proper public participation and publication of activities, and maintaining the Environmental Review Record for each jurisdiction.


Directly out of Law School, Ms. Siefert analyzed international trade and environment policy, served as a US delegate in international forums pertaining to ISO 14000 standards development (including the United Nations in Geneva, the Organization for Economic Development (OECD) in Paris, the World Trade Organization (WTO) in Seattle, NAFTA's Committee on Environmental Cooperation, and the International Organization for Standardization (ISO). Ms. Siefert facilitated large national and international stakeholder meetings as the Program Manager for an EPA grant intended to increase transparency in the ISO standards setting process. Ms. Siefert represented the NGO Working Group in partnership with ECOLOGIA (an international non-profit organization working at the grassroots level in Russia, China, and former Soviet-Bloc countries). Ms. Siefert organized and lead both national and international working groups of non-profit organizations at ISO standards writing meetings and promoted public involvement in environmental policy making.
Ms. Amelia Muccio is an emergency management and public health program manager with over 13 years of experience strategizing and leading national and international mitigation, preparedness, response, and recovery projects. Ms. Muccio has worked on all-hazards planning and policy development, grants management and evaluation, capacity building, Stafford Act sections 404/406 mitigation, continuity of operations, training, and exercises.

Currently, Ms. Muccio is supporting several projects in the Florida panhandle region, dedicated to assisting in recovery from Hurricane Michael. She is also involved in long-term recovery operations for the California Governor's Office of Emergency Services following the Camp and Woolsey wildfires of late 2018.

As part of the 10-person team for New York City (NYC) Hurricane Sandy Recovery, Ms. Muccio directly supported the resiliency and consequence assessment efforts of 16 city agencies. Between August 2013 and May 2015, Ms. Muccio spearheaded the submission of an $860 million Hazard Mitigation Grant Program (HMGP) Section 404 portfolio on behalf of the County as part of larger risk management and preparedness efforts. For Section 406, Ms. Muccio oversees the mitigation recovery effort for city agencies with a continuously expanding portfolio valued at $2.2 billion as of February 2017. Hazard mitigation programs of 404 and 406 are under the Federal Emergency Management Agency (FEMA) purview.

Before joining Hagerty, Ms. Muccio served for five years as the Director of Emergency Management for the New Jersey (NJ) Primary Care Association. In this position, she created statewide planning initiatives stressing ambulatory emergency preparedness and criticality assessments as a vital component to national and economic stability.

### Relevant Project Experience

**Project Manager / Team Lead | Hurricane Sandy Recovery | New York City**
- Manages 10-person team and coordinates with city agencies on technical assistance issues including Project Worksheet (PW) development and hazard mitigation.

**Project Manager | 404 Hazard Mitigation Grant Program (HMGP) | Hurricane Sandy Recovery | New York City**
- Managed 17-person team during the Letter of Intent (LOI) and initial application phase and continues to coordinate with city agencies for technical assistance issues including scope of work changes, benefit-cost analysis (BCA), RFI responses, 428 Alternative Procedures, and programmatic eligibility.

### Education
- **Master of Public Administration in International Public and Non-Profit Management**, New York University
- **Bachelor of Science in Public Health**, Rutgers College
- **Work Study Program, Infectious Disease**, University of Cape Town

### Certifications
- **Certified Emergency Manager**
- **Certified Business Continuity Professional (DRII–CBCP)**
- **Master Exercise Practitioner (MEP)**
- **HSEEP certified**
- **ICS Train-the-trainer certified**
- **40-Hour HAZWOPER Certification (OSHA)**

### Relevant Highlights
- Experienced mitigation, preparedness, and recovery planner
- More than 10 years managing complex domestic and international response and recovery projects
- Founded and managed a global disaster relief non-profit organization
- Disaster response to Haitian earthquake, Tohoku earthquake and tsunami, Indian tsunami, hurricanes Katrina and Sandy, Tropical Storm Isaac, and the 2004 Florida hurricanes
Amelia Muccio
Disaster Recovery/HMGP SME

- Managed the development of 43 HMGP applications for NYC agencies including New York Police Department (NYPD), New York City Housing Authority (NYCHA), Department of Environmental Protection (DEP), and Office of Recovery and Resiliency (ORR).
- Provided ongoing technical assistance to NYC for HMGP applications that were funded and awarded grants by FEMA. Assist with program eligibility and cost effectiveness issues for Phase 1 HMGP grants. Work with NYC to minimize risk and deobligation of current HMGP grants.

Project Manager | Risk Mitigation System/HMGP Project Phase | Breezy Point, New York
- Coordinated Phase I of the $58.1 million risk mitigation project intended to provide protection from flood to manage infrastructure within the area of Breezy Point, New York. Phase I included various cost effectiveness and technical feasibility tasks such as justifying the application's BCA to coordinating permitting and regulatory issues in advance of the design and construction phases. Completed and submitted Phase 1A to FEMA. Project was successfully awarded Phase 1B, design and engineering.

Project Manager | Business Continuity Recovery Project | AmeriCares
- Provided onsite research and stakeholder analyses at four Community Health Centers impacted by Hurricane Sandy.
- Completed a comprehensive needs assessment of Community Health Centers impacted by Hurricane Sandy. Assisted Community Health Centers to leverage available funding to maximize resiliency planning and continuity of operations planning.

Director | Haiti Project and Disaster Operations | Human Society International
- Provided emergency management, international development, and public health expertise to ongoing recovery projects in Japan and Haiti; provided direct field oversight in Haiti to staff of 12.

Emergency Management Planner/Consultant | ATCS PLC
- Developed, facilitated, and evaluated exercise and training materials for federal agencies.
- Provided radiological contingency planning and focus group facilitation for federal recovery programs.
- Developed Improvised Nuclear Device (IND) focused strategic management tools for federal Emergency Support Functions (ESFs).

CRI Exercise and Training Consultant | State of Maine
- Coordinated training and exercise components of Maine's CRI Project.

Director of Emergency Management | NJ Primary Care Association, Inc.
- Executed national and statewide emergency management planning initiatives stressing ambulatory preparedness as a vital component to national and economic stability.
- Met challenge of integrating emergency management best practices into 100 statewide facilities serving 425,000 at-risk residents.
- Directed emergency management planning activities of 1,600 employees in launching All Hazards Preparedness Program.
- Integrated emergency preparedness, developed Standard Operating Procedures (SOPs)/Standard Operating Guidelines (SOGs), provided annual training/exercise activities and tailored COOP plans and business continuity plans.
- Created the first HSEEP compliant exercise program tailored for FQHCs nationally and succeeded in establishing New Jersey's FQHCs as the first Centers to attain NIMS (National Incident Management System) compliancy nationally.
Amelia Muccio
Disaster Recovery/HMGP SME

• Trained more than 5,000 health care professionals in Incident Command System, NIMS, National Response Framework, continuity of operations planning, novel pandemic influenza, infection control, personal protective equipment, fit-testing and behavioral health awareness.

Emergency Management Planner/Consultant | ATCS PLC

• Developed, facilitated, and evaluated exercise and training materials for federal agencies.
• Provided radiological contingency planning and focus group facilitation for federal recovery programs.
• Developed IND focused strategic management tools for federal ESFs.

Cities Readiness Initiative (CRI) Exercise and Training Consultant | City of Portland Department of Health and Human Services

• Coordinated Portland’s CRI training and exercise program designed to maximize response capabilities during large scale public health emergency.
• Responsible for planning, conducting, and evaluating CRI training and exercises focused on mass prophylaxis and POD effectiveness.

Employment History

Hagerty Consulting, Inc., Senior Managing Associate, Recovery Programs, 2013-Present

The Humane Society of the United States, Director, Haiti Project and Disaster Operations, 2011-2013


New Jersey Primary Care Association, Director of Emergency Management, 2006-2011

Maine CRI Project, Cities Readiness Initiative Exercise & Training (Consultant), 2010-2011

The Humane Project, Founder/Executive Director, 2004-2010

New Jersey Primary Care Association, Bioterrorism Preparedness Educator, 2004-2006
Kevin Leonard
Technical Architect

Publicis Sapient
Salesforce.com Experience

Project Role

Responsibilities

Technical Architect
Team Lead for the salesforce.com integration and customization. Provide timeline and resource management for the integration implementation. Author the technical design specification. Manage overall development, validation, and deployment plans. Review code to ensure it conforms to salesforce.com best practices. Provide best practices guidance to Client technical team.

Relevant Project Work

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Industry</th>
<th>Project Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizens - Agency Administration Solution</td>
<td>Government</td>
<td>09/10/2018 - 08/09/2019</td>
</tr>
<tr>
<td>WA DEL - Early Achievers Program Management Portal and Public Site</td>
<td>Government</td>
<td>01/01/2017 - 12/18/2018</td>
</tr>
<tr>
<td>WA DEL - Licensing Management and Mobile Inspection App</td>
<td>Government</td>
<td>09/12/2016 - 07/31/2017</td>
</tr>
<tr>
<td>Citadel - Fusion External System Integration PID</td>
<td>Financial Services</td>
<td>03/20/2017 - 06/30/2017</td>
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</table>

Kevin is a Technical Architect with an extensive background in CRM. Kevin takes pride in developing meaningful and effective solutions for customers. He specializes in development of Visualforce, custom and standard Salesforce objects, object trigger functionality and activity customization, only to name a few. Kevin is a high-performance architect focused on best practices and quality standards.
Previous Work Experience

Employer | Name | Position Title | Dates
--- | --- | --- | ---
IMS HEALTH, NEXXUS APPLICATION | Senior Solutions Architect | Technical lead on international implementation teams. Work directly onsite with life sciences clients, their marketing agencies and vendors, our offsite software developers and offshore implementation developers to ensure on-time quality deliverables.

Partner with our clients to build out use cases, business requirements, and success criteria.

COGNIZANT TECHNOLOGY SOLUTIONS | Manager | Customer communication campaigns designed to handle interaction with the customer, starting at the date of order submit and leading up to order installation. Automated Outbound SMS and Voice used in combination with live calls and emails to create effective communication strategy.

Built out daily Executive Dashboards/Scorecards for Project, rolling up all individual campaigns into a master view for executives.

FATHOM SOLUTIONS | Senior Consultant | Lead a team of developers, requirements analysts, and quality assurance personnel.

Education

Institution | Name | Degree / Diploma | Date
--- | --- | --- | ---
UNIVERSITY OF NOTRE DAME | Bachelor Of Science | Degree In Civil Engineering | 05/16/1999
Jason Flammang
Solution Architect
Publicis Sapient
Salesforce Experience

**Project Role**

**Responsibilities**

- Work with business owners to craft a solution that optimizes Salesforce for the client’s business environment.
- Lead visioning conversations during requirements workshop.
- Evaluate requirements and review and approve solution design.
- Conduct requirements and solution design workshops.
- Facilitate business process analysis and automation discussions.
- Provide subject matter expertise with the Salesforce application and process automation.

**Relevant Project Work**

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Industry</th>
<th>Project Dates</th>
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<tbody>
<tr>
<td>hubNashville Phase 2 Implementation</td>
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<td>12/11/2017 - 08/17/2018</td>
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<tr>
<td>IHS Markit 2018 MVP Partner Community</td>
<td>Business Services</td>
<td>09/18/2017 - 08/15/2018</td>
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<td>Iowa Department of Public Safety BasicGov Implementation</td>
<td>Government</td>
<td>10/17/2017 - 04/30/2018</td>
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<tr>
<td>WYO: State Lands Permitting/Inspections App</td>
<td>Government</td>
<td>09/20/2017 - 04/20/2018</td>
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<tr>
<td>hubNashville Phase 1 Change Management Program</td>
<td>Government</td>
<td>11/20/2017 - 02/16/2018</td>
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</table>

Jason brings a great deal of project management and technical strengths and experience to the Publicis Sapient team. He leads powerful teams to early successes with new clients in new endeavors, and his prowess in Salesforce technology provides invaluable excellence and insight to project development for 311 solutions. Jason has been in customer facing roles, managing day to day progress and successes, and most recently has dedicated himself to developing his technical skills in the Salesforce platform. His well-rounded experiences provide him the tools he needs to manage Salesforce projects from the customer’s perspective as well as the technological view.
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Industry</th>
<th>Project Dates</th>
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<tbody>
<tr>
<td>State of Iowa Professional Bureau</td>
<td>License Management</td>
<td>11/21/2016 - 10/20/2017</td>
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<td>Namasté Solar</td>
<td>Managed Services</td>
<td>04/17/2017 - 05/31/2017</td>
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<td>NCDMVA</td>
<td>Form Capture / PDF Output</td>
<td>11/28/2016 - 02/01/2017</td>
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<table>
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<tr>
<th>Previous Work Experience</th>
<th>Employer Name</th>
<th>Position Title</th>
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<tr>
<td>Strategic Systems</td>
<td>Administrator</td>
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<td>11/01/2013 - 10/19/2016</td>
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<tr>
<td>Accelerated Receivables Solutions</td>
<td>Director of Marketing and Client Services</td>
<td>01/01/2010 - 11/30/2013</td>
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<tr>
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<th>Institution Name</th>
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<tr>
<td>University Of Nebraska Lincoln</td>
<td>Bachelor Of Science Degree</td>
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<tr>
<td>Western Nebraska Community College</td>
<td>Associate Of Arts Degree</td>
<td>01/01/2006</td>
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</tbody>
</table>
Oswin Correa  
Salesforce Developer

Publicis Sapient Salesforce  
Experience

Project Role
Responsibilities
Developer
Contribute to key deployment documentation. Develop custom code. Assist Client with legacy data extraction, cleaning, and scrubbing. Assist Client with data mapping from legacy to Salesforce.com systems. Import data, sampling and validation. Unit testing and error handling.

Oswin has more than 4 years of experience in Salesforce development and has extensive knowledge of technical as well as functional aspects of Salesforce.com. He has successfully completed 8+ projects involving Sales Cloud, Service Cloud and Lightning Components in Force.com Platform. He has developed several complex custom applications using Apex & Visualforce. He also has extensive experience in frontend development using HTML5, CSS, Javascript, jQuery etc. He has experience in the complete Salesforce development lifecycle including Scoping, requirement analysis, technical design, development, testing and deployment.

Relevant Project Work

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Industry</th>
<th>Project Dates</th>
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<tr>
<td>Naperville Identity Management</td>
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<td>CDOT - Cotrams Phase VII</td>
<td>Government</td>
<td>10/02/2017 - 10/31/2018</td>
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<td>CDOT - Safe Route to School Grant Applications</td>
<td>Government</td>
<td>06/14/2018 - 09/30/2018</td>
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<td>hubNashville - Phase 2 Implementation</td>
<td>Government</td>
<td>07/18/2018 - 09/28/2018</td>
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<td>CA DIR: Retaliation Complaint System</td>
<td>Government</td>
<td>10/13/2017 - 09/25/2018</td>
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<td>DOVER - Portal Monitoring Enhancement</td>
<td>Manufacturing</td>
<td>04/27/2018 - 08/17/2018</td>
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<tr>
<td>IHS Markit - Implementation Assistance</td>
<td>Business Services</td>
<td>06/12/2017 - 12/31/2017</td>
</tr>
</tbody>
</table>
Previous Work Experience

Sapient Consulting

**Employer Name:**

**Position Title:** Senior Developer

**Dates:** Sept 2014 – 2017

- Usage of Salesforce Lightning design system in the Visual force Pages
- Usage of HTTP Callouts
- Understand and use Email Services and Inbound Email Handlers
- Creation of Bulk handled triggers
- Test classes for the callouts. Usage of HTTP Mock classes.
- Package creation (Both released and Managed)
- Documenting the whole application and User Guide

Education

**Institution Name:**

**Degree / Diploma:** Bachelor of Engineering in Computer Science

**Date:**

NMAM Institute of Technology, Nitte, India
## Cost of Vendor’s Offer

### Cost Components of Initial Term – Year One

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year One</th>
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<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
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<td>173</td>
<td>$43,250</td>
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<tr>
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<td>Technical Architect</td>
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<td>$172,800</td>
</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$250.00</td>
<td>40</td>
<td>$10,000</td>
<td>$120,000</td>
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<tr>
<td>CDBG Subject Matter Expert</td>
<td>$250.00</td>
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<td>$120,000</td>
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<tr>
<td>Disaster Recovery/HMGP Subject Matter Expert</td>
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<td>30</td>
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<td>$90,000</td>
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<tr>
<td>Estimate for First Year of Contract</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td><strong>Total Not to Exceed Year One Pricing</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>$1,449,000</strong></td>
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</table>

### Cost Components for OPTIONAL Year Two

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
<td>$257.50</td>
<td>173</td>
<td>$44,548</td>
<td>$534,570</td>
</tr>
<tr>
<td>Solution Architect</td>
<td>$267.80</td>
<td>50</td>
<td>$13,390</td>
<td>$160,680</td>
</tr>
<tr>
<td>Technical Architect</td>
<td>$267.80</td>
<td>50</td>
<td>$13,390</td>
<td>$160,680</td>
</tr>
<tr>
<td>Developer</td>
<td>$247.20</td>
<td>40</td>
<td>$9,888</td>
<td>$118,656</td>
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<tr>
<td>Support Lead</td>
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<td>80</td>
<td>$14,832</td>
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</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
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<td>$10,300</td>
<td>$123,600</td>
</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$257.50</td>
<td>40</td>
<td>$10,300</td>
<td>$123,600</td>
</tr>
<tr>
<td>Disaster Recovery/HMGP Subject Matter Expert</td>
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<td>30</td>
<td>$7,725</td>
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<td>Estimate for Second Year</td>
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VENDOR: Publicis Sapient
### Cost Components for OPTIONAL Year Three

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
<td>$265.00</td>
<td>173</td>
<td>$45,845</td>
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<tr>
<td>Solution Architect</td>
<td>$275.60</td>
<td>50</td>
<td>$13,780</td>
<td>$165,360</td>
</tr>
<tr>
<td>Technical Architect</td>
<td>$275.60</td>
<td>50</td>
<td>$13,780</td>
<td>$165,360</td>
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<tr>
<td>Developer</td>
<td>$254.40</td>
<td>40</td>
<td>$10,176</td>
<td>$122,112</td>
</tr>
<tr>
<td>Support Lead</td>
<td>$190.80</td>
<td>80</td>
<td>$15,264</td>
<td>$183,168</td>
</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$265.00</td>
<td>40</td>
<td>$10,600</td>
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<tr>
<td>CDBG Subject Matter Expert</td>
<td>$265.00</td>
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<td>$10,600</td>
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<td>30</td>
<td>$7,950</td>
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### Cost Components for OPTIONAL Year Four

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
<td>$272.50</td>
<td>173</td>
<td>$47,143</td>
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<tr>
<td>Solution Architect</td>
<td>$283.40</td>
<td>50</td>
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<td>$170,040</td>
</tr>
<tr>
<td>Technical Architect</td>
<td>$283.40</td>
<td>50</td>
<td>$14,170</td>
<td>$170,040</td>
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<tr>
<td>Developer</td>
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<td>$10,464</td>
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<td>Support Lead</td>
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<td>$15,696</td>
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<tr>
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<td>$10,900</td>
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<td>Estimate for Fourth Year</td>
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<td><strong>$1,579,410</strong></td>
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</table>

VENDOR: Publicis Sapient
### Cost Components for OPTIONAL Year Five

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
<td>$280.00</td>
<td>173</td>
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</tr>
<tr>
<td>Solution Architect</td>
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<td>50</td>
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<tr>
<td>Technical Architect</td>
<td>$291.20</td>
<td>50</td>
<td>$14,560</td>
<td>$174,720</td>
</tr>
<tr>
<td>Developer</td>
<td>$268.80</td>
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<td>$10,752</td>
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<td>Support Lead</td>
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<td>80</td>
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</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$280.00</td>
<td>40</td>
<td>$11,200</td>
<td>$134,400</td>
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<tr>
<td>CDBG Subject Matter Expert</td>
<td>$280.00</td>
<td>40</td>
<td>$11,200</td>
<td>$134,400</td>
</tr>
<tr>
<td>Disaster Recovery/HMGP Subject Matter Expert</td>
<td>$280.00</td>
<td>30</td>
<td>$8,400</td>
<td>$100,800</td>
</tr>
<tr>
<td>Estimate for Fifth Year</td>
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<td>n/a</td>
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</tr>
<tr>
<td><strong>Total Not-to-Exceed Year Five Price</strong></td>
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<td><strong>$1,622,880</strong></td>
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</table>

### Cost Components for OPTIONAL Year Six

<table>
<thead>
<tr>
<th>Classification of Personnel (e.g. Program Manager, Developer)</th>
<th>Hourly rate</th>
<th>Estimated Hours of Effort per Month</th>
<th>Estimated Price per Month</th>
<th>Estimated Price for Year Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onsite Project Manager/Salesforce Consultant</td>
<td>$287.50</td>
<td>173</td>
<td>$49,738</td>
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<td>50</td>
<td>$14,950</td>
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</tr>
<tr>
<td>Technical Architect</td>
<td>$299.00</td>
<td>50</td>
<td>$14,950</td>
<td>$179,400</td>
</tr>
<tr>
<td>Developer</td>
<td>$276.00</td>
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<td>$11,040</td>
<td>$132,480</td>
</tr>
<tr>
<td>Support Lead</td>
<td>$207.00</td>
<td>80</td>
<td>$16,560</td>
<td>$198,720</td>
</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$287.50</td>
<td>40</td>
<td>$11,500</td>
<td>$138,000</td>
</tr>
<tr>
<td>CDBG Subject Matter Expert</td>
<td>$287.50</td>
<td>40</td>
<td>$11,500</td>
<td>$138,000</td>
</tr>
<tr>
<td>Disaster Recovery/HMGP Subject Matter Expert</td>
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<td>30</td>
<td>$8,625</td>
<td>$103,500</td>
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<tr>
<td>Estimate for Sixth Year</td>
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</tr>
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</tbody>
</table>

### Summation of Cost Components for All Six Potential Contract Years

<table>
<thead>
<tr>
<th>Total # of Hours over the Six Years</th>
<th>Not-to-exceed price for all Six Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>3018</td>
<td><strong>$9,346,050</strong></td>
</tr>
</tbody>
</table>

VENDOR: Publicis Sapient
Signed Vendor Certification Form (Attachment D)
ATTACHMENT E: LOCATION OF WORKERS UTILIZED BY VENDOR

In accordance with NC General Statute 143-59.4, the Vendor shall detail the location(s) at which performance will occur, as well as the manner in which it intends to utilize resources or workers outside of the United States in the performance of this Contract. The State will evaluate the additional risks, costs, and other factors associated with such utilization prior to making an award. Please complete items a, b, and c below.

a) *Will any work under this Contract be performed outside the United States?*  
   YES [ ] NO [ ]

If the Vendor answered “YES” above, Vendor must complete items 1 and 2 below:

1. List the location(s) outside the United States where work under this Contract will be performed by the Vendor, any sub-Contractors, employees, or other persons performing work under the Contract:
   
   Bangalore, India for potential Salesforce development efforts.

2. Describe the corporate structure and location of corporate employees and activities of the Vendor, its affiliates or any other sub-Contractors that will perform work outside the U.S.:

   Employees in our Bangalore, India office are employees of Publicis Sapient.

b) *The Vendor agrees to provide notice, in writing to the State, of the relocation of the Vendor, employees of the Vendor, sub-Contractors of the Vendor, or other persons performing services under the Contract outside of the United States*  
   YES [ ] NO [ ]

   NOTE: All Vendor or sub-Contractor personnel providing call or contact center services to the State of North Carolina under the Contract shall disclose to inbound callers the location from which the call or contact center services are being provided.

c) *Identify all U.S. locations at which performance will occur:*

   North Carolina, Florida, Colorado, Ohio, New York
## ATTACHMENT F: DESCRIPTION OF FIRM SUBMITTING OFFER

| Full name, address, and telephone number of the firm | Publicis Sapient  
1845 Folsom Street  
Boulder, CO 80302  
720-277-1925 |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Date established</td>
<td>2010</td>
</tr>
</tbody>
</table>
| Ownership | Public  
Partner  
Subsidiary  
Other (specify)  
LLC |
| If incorporated, state of incorporation. | Delaware |
| Background of firm | Platinum level Salesforce consulting partner, now a part of Publicis Sapient, a leader in digital marketing transformation. For more information about our firm, please see our response to Specifications 1 and 20 above. |
| Number of full-time employees on January 1st for the last three years or for the duration that the Vendor’s firm has been in business, whichever is less. | 2017 = 70  
2018 = 144  
2019 = 150 |
| Is Vendor a Historically Underutilized Business?* | YES ☑  
NO ☑ |
| Is Vendor a North Carolina Certified HUB Vendor? | YES ☑  
NO ☑ |

*Historically Underutilized Businesses (HUBs) consist of minority, women and disabled business firms that are at least fifty-one percent owned and operated by an individual(s) of the aforementioned categories. Also included in this category are disabled business enterprises and non-profit work centers for the blind and severely disabled. [http://ncadmin.nc.gov/businesses/hub](http://ncadmin.nc.gov/businesses/hub)

Pursuant to N.C.G.S. §§ 143B-1361(a), 143-48 and 143-128.4, the State invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled. This includes utilizing subcontractors to perform the required functions in this RFP contact the NC HUB Office at 919-807-2330 for answers to questions concerning NC HUB certification.
References

Reference #1: Jessica Chan
Systems Administrator
California Office of Traffic Safety
2208 Kausen Drive
Elk Grove, CA  95758
916-509-3051

Time Period: June 2016 – May 2017

Summary: The California Office of Traffic Safety (OTS) implements a highway safety program to address the behavioral factors that impact safety on the road. Its mission is to effectively and efficiently administer traffic safety grants while fostering partnerships to deliver innovative programs that reduce traffic deaths, injuries and economic losses.

OTS streamlines hundreds of grant opportunities by investing in a customer friendly grant application system. The cloud solution combined with our powerful form tool increased the visibility & integrity of 300-400 grants annually. Some project highlights include:

• A user-friendly interface for applicants/grantees to facilitate the grant application process
• Improved data integrity, less data entry/redundancy, and increased visibility of hundreds of grants
• Allowed submitting & tracking claims, reconciled budgets, and measured grant performance quantitatively
• Achieved a high adoption rate through Train-the-Trainer, also improving Stakeholder involvement through a phased approach

Reference #2: Kathy Fedler
CDBG Disaster Recovery Program Manager
Longmont Civic Center
350 Kimbark Street
Longmont, CO 80501
303-651-8736
Kathy.Fedler@longmontcolorado.gov


Summary: Developed a central grants management system for the Boulder County Collaborative (BCC). BCC is the organization administered by the City of Longmont charged with managing Boulder County’s CDBG-DR Recovery Programs from the Boulder County Floods of 2013. CDBG Funded Activities included Infrastructure, Housing Repair, Mobile Home Replacement, Buyout, Clearance and Demo, Temporary Rental Resistance, Uniform Relocation (URA) and FEMA Match.

The system helped the BCC manage the CDBG grant lifecycle including intake, eligibility review, duplication of benefits (DOB), grant award, RFPs, contracts, monitoring, crosscutting compliance (Including Section 3 and Davis Bacon) and financial management.

Monitoring reports from HUD have noted BCC’s Salesforce system as a best practice. These tools have kept the BCC clear of any findings, concerns, or any funds recapture.

From a U.S. Department of Housing and Urban Development Monitoring Report, May 2016

"The Collaborative appears to be a model method for units of local government to combine resources and identify a high-capacity lead agency to administer recovery programs on behalf of..."
The city of Longmont's administration is strengthened by its adoption of a central grants management system using the Salesforce product platform. The city's database includes key data on project status, monitoring efforts, and supporting documentation for draw requests. The system is also set up to be consistent with the DRGR action plan and import data that can be pulled from DRGR.

Reference #3: Qing Lin, Colorado Department of Transportation – COTRAMS Project
qing.lin@state.co.us
303-757-9973

Time Period: 2014 - Present

Project Summary: Through an extensive business requirements definition process that included both CDOT and PS personnel, PS developed a customized Salesforce grants management system for users to track grant requests, disbursements, property information, and equipment information. The tool manages a grant from request to completion, and includes functionality to track projects and inventory linked to grants, as well as reimbursements submissions and progress to payment. PS also developed a portal for users to submit and update grant applications that integrated with the Federal Transit system, and a PS AP portal to track financial information. The new tool helped to eliminate manual processes and assisted with managing grants more efficiently (end-to-end) from the initial request phase to completion. PS provided requirements gathering, solution design, configuration, custom code development, all testing, training, and post go-live support.
Financial Statement Information
Errata and Exceptions

Exceptions to Specifications

Section C: Enterprise Specification, Sub Section 5: Requesting that some deliverables be assigned a 3 or 5 day for milestone approval/rejection, rather than 10 days.

Attachment A: Definitions, 2) Deliverables: Deliverables, as pertaining to Services Agreement, is not inclusive of Hardware and Software services. These should be obtained via a Salesforce direct contract.

General Project Exceptions

Publicis Sapient Salesforce Practice's estimates and the statement of work herein are based on the following list of key assumptions. Deviations that arise during the project will be managed through the Change Control Procedure, and may result in adjustments to the Project Scope, Estimated Schedule, Charges, and other terms. These adjustments may consist of changes on a time and materials basis using the negotiated rates in effect at such time for any resulting additional work or waiting time. If an assumption deviation is not resolved through the documented Change Control Procedure within (30) days then the issue will be resolved in accordance with the documented Escalation Procedure outlined in the Master Services Agreement.

1. Native Salesforce functionality will be leveraged and the default approach to meet requirements. The State agrees to leverage as much out of the box configuration as possible. It is anticipated that the State will increase productivity by leveraging the way it uses Salesforce. The State may customize the core platform, or develop its own apps, by leveraging the full range of tools — everything from easy point-and-click interfaces, to advanced platforms for every programming language. For more details please visit: http://www.salesforce.com/salesforce-advantage/

2. PS SP provides, for the State’s review, a sample of the documentation PS SP will deliver. If the State desires to use a different format, content, and/or level of detail, additional time and costs may be required to perform the work.

3. The Project will use PS SP’s Salesforce Community, ProjectForce, for all project management, requirements management, and defect management activities. Access for this tool will be provided to the State at no cost. PS SP has grown and learned a lot from over 1500 completed projects. PS SP has made substantial financial, and time commitments, to perfect this tool and bake in the lessons learned. Your project will be delivered faster and with much lower risk than the traditional method of deploying technology. Here are some screenshots from ProjectForce:
4. Any 3rd Party software deemed required, that is not specifically included in PS SP’s pricing document, will be purchased directly by the State.

5. Timeline: PS SP has included an early draft timeline with an estimate of sprint iterations, milestone dates and target go-live. This information will be updated at the end of the Analysis phase upon approval of requirements. The Project timeline is a living document and may be modified throughout the project life-cycle.

6. The State recognizes that the success of the Incident Management project, including the ability to meet the target go-live date, is a collaborative effort and the collective responsibility of all parties, including the up-front procurement process to authorize the project start.

7. The State is responsible for ensuring appropriate and empowered participants attend, and contribute to required sessions, design reviews, user acceptance testing, and trainings. The State staff will have the necessary authority and functional knowledge of the existing systems, and processes, to carry out their assigned implementation tasks. The State project team members must have a thorough understanding of business requirements, as they relate to any aspect of the project with which they are directly involved. The State project team members and SME’s selected to participate should be key members of the areas that are being affected with the implementation of the system. The State Leadership Team will be empowered to make decisions. All project team members will be expected to contribute to decision making, in a timely manner with respect to implementation of the project, so as not to negatively impact the timeline or project schedule. It is vital that the State and the PS SP project team members utilize their professional communication skills in order to draw out information, as well as provide feedback, on the goals and progress of the Program.
8. PS SP is constantly focused on Salesforce Certifications within its workforce. We currently hold 150 certifications. It is expected that DORA will ensure at least 1 of its staff members become a Salesforce Certified Administrator. It is anticipated that the State will invite its project team-members to rapidly become familiar with Salesforce. A very user friendly tool is available at: https://developer.salesforce.com/trailhead/en

9. The State is most knowledgeable about how the new application will meet their business process requirements, and is therefore responsible for conducting User Acceptance Testing (UAT) within the project timeline. PS SP will conduct Unit, System, and Integration testing on our delivered functionality, but the State will write and perform all User Acceptance Testing.

10. The deliverables should be subject to a well defined, and objective acceptance testing process. The acceptance process should be based on agreed upon criteria, during an agreed upon time period (3-5 days is usually sufficient). PS SP will correct defects at no extra cost (or issue a refund if unable to do so). Otherwise final acceptance is deemed to occur at the end of the acceptance process.

11. The State will identify internal IT resources, prior to project kickoff, and will insure any required development, hardware/software procurement, network access, security review or other responsibilities will adhere to the project timeline.

12. Both the State and PS SP will use their best efforts to avoid the need to revisit decisions reached in completing Milestones. Both parties acknowledge that a material change to a previous decision could potentially have an impact on cost and schedule, which will be handled through the Change Control Procedure process.

13. The State is responsible for certain key project tasks, deliverables, and timely reviews of PS SP’s work to maintain the project schedule and budget. Failure to review deliverables, and delayed or changed decisions, may necessitate a change order. The project timeline is based on the assumption that the State will contribute to, and review, deliverables within 5 business days of receipt. When presented with a requirement for business input, the State will provide/make an answer/decision within three (3) business days. On an exception basis only, PS SP understands that some decisions will take longer, and may affect the project timeline, and may grant an extension of time based upon State request.

14. The State will work with PS SP to create test scenarios, and Client will log defects into PS SP’s Project Force in a timely manner after discovery. PS SP will also log defects into ProjectForce as discovered during our testing.

15. Depending on the volume, and complexity, of the requirements uncovered during the analysis phase, the work may be delivered in multiple sprints/iterations which may impact or modify the schedule.

16. Custom pages developed by PS SP will be supported in the latest version of Firefox and Chrome. If the State needs the pages to be supported by additional browsers, there may need to be an additional, billable, work effort to the custom effort that is not included in the current scope.

17. The State agrees to perform all cleansing and de-duping of data.

18. Any contractors or consultants whose services are acquired directly by the State in connection with this project will perform their assigned tasks in a timely manner. The State will manage their efforts directly. PS SP will work cooperatively with the selected consultants, if applicable.

19. All formal State policy and procedure documentation will be the responsibility of the State.

20. The State and PS SP will implement commercially reasonable means to provide continuity of its core project team skills throughout the life of the project.

21. Project materials will be delivered in electronic format and will be developed in U.S. English.
22. For training, the State will provide all meeting support, and logistics, for classroom training sessions, including but not limited to class schedules, meeting rooms, material reproduction, flipcharts, student PC’s, and overhead projectors. The State will be responsible for student attendance.

23. The State will be responsible for the performance of the network.

**Contract Assumptions:**

1. Contracting or Subcontracting - PS SP is a software implementation firm, but not a direct reseller of software. To the extent that this proposal requires software licenses from Salesforce.com and other providers, PS SP requests that, post-award, Client contracts separately with the software provider or that Client contract with a software and services re-seller such as Carahsoft, SHI or other similar firm, who will, in turn, subcontract to PS SP.

2. Any applicable taxes for services will be included in invoices.

3. All timeline, cost, milestones and other response information are based upon our current understanding of the project, as described in the RFP and applicable Addendums. If at any point prior to contract signing PS SP learns of a requirement or fact that was unanticipated we will negotiate, in good faith, with the State to resolve to our mutual benefit and understanding.

4. The State will have obtained all necessary software licenses prior to the start of the project.

5. The cost of printing and shipping training, support and user guides (if applicable) is the responsibility of the State.

6. As it relates to printing, printer hardware, and setup, these tasks are expected to be managed by the State.

7. PS SP is not responsible for the identification and interpretation of any applicable laws, regulations, and statutes that affect the existing State application systems or programs. It is the responsibility of the State to validate that the systems and programs meet the requirements of those laws.

8. Nothing is more important to us than your systems and data security. The State will leverage Salesforce to manage granular control over everything from user authentication to data access. It is expected that the State will use the Salesforce multi-layered approach to data security, and the industry standard that is trusted by the world’s most heavily regulated industries. For more details, please see: [https://trust.salesforce.com/trust/](https://trust.salesforce.com/trust/).

9. It is anticipated that upon final contract negotiations, the document order of precedence will be:
   a. Professional Services Agreement
   b. Any applicable Change Orders
   c. Project Requirements
   d. Statement of Work
   e. PS SP’s RFP response
   f. The State’s RFP.
Exceptions to Terms and Conditions:

8) **Acceptance Criteria:** Some deliverables may be approved/rejected in 3-5 days.

14) **Access to Persons and Records:** “...to examine all books, records, and accounts...” should be limited to sufficient pre-notice and no more than one time per calendar year.

19) **Default:** a) If Vendor fails to deliver or provide correct Services... Vendor performance that is exclusively within its control and obligation, is agreeable to Section 19.

21) **Termination:** b), i)...holding Vendor liable for any excess costs occasioned thereby... Publicis Sapient does not agree to this.

22) **Limitation of Vendor’s Liability:** Vendor’s liability under a Contract should be capped at an amount that is proportionate to fees received under the Contract. In addition, there should be a disclaimer of all consequential or indirect damages.

24) **Time is of the Essence** – Publicis Sapient proposes to strike this statement.
SFDC Service Terms

"AppExchange" means the online directory of on-demand applications that work with the Service, located at http://www.appexchange.com or at any successor websites.

"Reseller" means __________________.

"Service" means the online, Web-based applications branded as Salesforce, Service Cloud, Sales Cloud, Force.com and Chatter and provided by SFDC via http://www.salesforce.com and/or other designated websites, including associated offline components but excluding AppExchange applications.

"SFDC" means salesforce.com, inc. and its affiliates.

"Third-Party Applications" means online, Web-based applications and offline software products that are provided by third parties, interoperate with the Service, and are identified as third-party applications, including but not limited to those listed on the AppExchange.

"User Guide" means the online user guide for the Services, accessible via http://www.salesforce.com, as updated from time to time.

"Users" means Your employees, representatives, consultants, contractors or agents who are authorized to use the Service and have been supplied user identifications and passwords by You (or by Salesforce.com or Your Reseller at Your request).

"You" and "Your" means the entity which has contracted to purchase subscriptions to use the Service subject to the conditions of these SFDC Service Terms.

"Your Data" means all electronic data or information submitted by You to the Service.

1. **Use of Service.**

   (a) User subscriptions cannot be shared or used by more than one User (but may be reassigned from time to time to new Users who are replacing former Users who have terminated employment with You or otherwise changed job status or function and no longer require use of the Service).

   (b) You (i) are responsible for all activities occurring under Your User accounts; (ii) are responsible for the content of all Your Data; (iii) shall use commercially reasonable efforts to prevent unauthorized access to, or use of, the Service, and shall notify Your Reseller or Salesforce.com promptly of any such unauthorized use You become aware of; and (iv) shall comply with all applicable local, state, federal and foreign laws and regulations in using the Service.

   (c) You shall use the Service solely for Your internal business purposes and shall not: (i) license, sublicense, sell, resell, rent, lease, transfer, assign, distribute, time share or otherwise commercially exploit or make the Service available to any third party, other than to Users or as otherwise contemplated by these SFDC Service Terms; (ii) send spam or otherwise duplicative or unsolicited messages in violation of applicable laws; (iii) send or store viruses, worms, time bombs, Trojan horses and other harmful or malicious code, files, scripts, agents or programs; (v) interfere with or disrupt the
integrity or performance of the Service or the data contained therein; or (vi) attempt to gain unauthorized access to the Service or its related systems or networks.

(d) You shall not (i) modify, copy or create derivative works based on the Service; (ii) frame or mirror any content forming part of the Service, other than on Your own intranets or otherwise for its own internal business purposes; (iii) reverse engineer the Service; or (iv) access the Service in order to (A) build a competitive product or service, or (B) copy any ideas, features, functions or graphics of the Service.

2. **Service Provision.** SFDC will use commercially reasonable efforts to make the Services available 24 hours a day, 7 days a week, except for: (a) planned downtime (of which SFDC shall give at least 8 hours notice via the Services and which SFDC shall schedule to the extent practicable during the weekend hours from 6:00 p.m. Pacific time Friday to 3:00 a.m. Pacific time Monday), or (b) any unavailability caused by circumstances beyond SFDC’s reasonable control, including without limitation, acts of God, acts of government, flood, fire, earthquakes, civil unrest, acts of terror, strikes or other labor problems (other than those involving SFDC employees), or Internet service provider failures or delays, and (iii) provide the Services only in accordance with applicable laws and government regulations.

3. **Support and Your Data.** Reseller is Your sole provider of customer support for the Service. You acknowledge that the Service allows Reseller to access Your Data as required for Reseller’s provision of customer support to You, unless your administrator disables this functionality. Any exchange of data between You and Reseller, including Reseller’s access of Your Data through the Service in connection with support matters, is solely between You and Reseller. SFDC shall not be responsible for any disclosure, modification or deletion of Your Data resulting from any such access by Reseller.

4. **Third-Party Products and Services.** Any acquisition by You of third-party products or services, including but not limited to Third-Party Applications and implementation, customization and other consulting services, and any exchange of data between You and any third-party provider, is solely between You and the applicable third-party provider. SFDC does not warrant or Support third-party products or services, whether or not they are designated by SFDC as “certified” or otherwise.

5. **Integration with Third-Party Applications.** If You install or enable Third-Party Applications for use with the Service, You acknowledge that SFDC may allow providers of those Third-Party Applications to access Your Data as required for the interoperation of such Third Party Applications with the Service. Salesforce.com shall not be responsible for any disclosure, modification or deletion of Your Data resulting from any such access by Third-Party Application providers. In addition, the Service may contain features designed to interoperate with Third-Party Applications (e.g., Google, Facebook or Twitter applications). To use such features, You may be required to obtain access to such Third-Party Applications from their providers. If the provider of any such Third-Party Application ceases to make the Third-Party Application available for interoperation with the corresponding Service features on reasonable terms, SFDC may cease providing such Service features without entitling You to any refund, credit, or other compensation.

6. **Proprietary Rights.** Subject to the limited rights expressly granted hereunder, Salesforce.com reserves all rights, title and interest in and to the Service, including all related intellectual property rights. The Service is deemed Salesforce.com confidential information, and You will not use it or disclose it to any third party except as permitted in these SFDC Service Terms.

7. **Your Data.** As between Salesforce.com and You, You exclusively own all rights, title and interest in and to all of Your Data. Your Data is deemed your confidential information.
8. **Compelled Disclosure.** If either You or Salesforce.com is compelled by law to disclose confidential information of the other party, it shall provide the other party with prior notice of such compelled disclosure (to the extent legally permitted) and reasonable assistance, at the other party’s cost, if the other party wishes to contest the disclosure.

9. **Suggestions.** You agree that Salesforce.com shall have a royalty-free, worldwide, transferable, sublicenseable, irrevocable, perpetual license to use or incorporate into the Service any suggestions, enhancement requests, recommendations or other feedback provided by You or Your Users relating to the operation of the Service.

10. **Fees.** Contracted for fees for use of the Service represent a firm commitment: i.e., an order cannot be canceled during the term of the subscriptions, and the number of User subscriptions contracted for cannot be reduced in the middle of a subscription term.

11. **Termination.** You may not cancel or terminate an executed subscription order. User subscriptions will automatically renew for additional periods of one (1) year at the list price in effect at the time of renewal unless You give Your Reseller notice of termination at least 30 days prior to the end of the relevant subscription term. Salesforce.com reserves the right to immediately terminate Your use of the Service without notice due to a breach of the terms of these SFDC Service Terms by You or any User.

12. **Data Storage.** You are entitled to a cumulative amount of storage per User subscription for no additional charge as set forth in the User Guide for the Service subscription type purchased. You may purchase additional storage if necessary, and you may contact Your Reseller for then-current rates.

13. **No Warranty.** SALESFORCE.COM MAKES NO WARRANTIES OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE REGARDING THE SERVICE AND/OR SUPPORT, AND SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW. IN THE EVENT THAT YOUR AGREEMENT WITH YOUR RESELLER PROVIDES ANY WARRANTIES WITH RESPECT TO THE SERVICE AND/OR SUPPORT, SUCH WARRANTIES ARE SOLELY BETWEEN YOU AND YOUR RESELLER.

14. **No Liability.** IN NO EVENT SHALL SALESFORCE.COM HAVE ANY LIABILITY TO YOU OR ANY USER FOR ANY DAMAGES WHATSOEVER, INCLUDING BUT NOT LIMITED TO DIRECT, INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES, OR DAMAGES BASED ON LOST PROFITS, HOWEVER CAUSED AND, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, WHETHER OR NOT EITHER YOU OR SALESFORCE.COM HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

15. **Further Contact.** Salesforce.com may contact you regarding new Salesforce.com service features and offerings.

16. **Third Party Beneficiary.** SFDC shall be a third party beneficiary to the agreement between You and Reseller solely as it relates to these SFDC Service Terms.