

**TO: Prospective Suppliers**

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

**DATE: July 13, 2022**

**RE: Request for Proposal # 222-51**

**Salesforce CRM Software Managed Services**

Grand Valley State University is accepting proposals for a Salesforce CRM software managed services agreement for its Michigan Small Business Development Center (SBDC).

If you wish to provide this service, submit your proposal by e-mail to smalligk@gvsu.edu no later than **5:00 p.m. Friday, August 19, 2022**. Write **RFP #222-51** in the subject line of your email. Your proposal must be received by that date and time. No telephone, fax, drop-off, or verbal quotations will be accepted. GVSU is not responsible for late, lost, misdirected, incomplete, or illegible proposals.

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

**Instructions:**

1. Project Schedule:  
July 13, 2022 RFP released

August 19, 2022 5:00 pm Proposal Submission Deadline  
August 21-26, 2022 Interviews (online)

September 1, 2022 Proposal awarded by

January 2023 Contract Start Date

2. Proposals must be submitted by e-mail to smalligk@gvsu.edu no later than 5:00 p.m. EDT on Friday August 19, 2022. Write **RFP #222-51** in the subject line of your e-mail. Your proposal must be received by that date and time. No telephone, fax, or verbal quotations will be accepted.

GVSU is not responsible for late, lost, misdirected, damaged, incomplete, illegible, or postage-due mail.

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

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

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

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

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

7. Complete the Proposal Form on page 5 and 6.

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

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

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

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

**Specifications:**

**Background**

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

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

Michigan SBDC is seeking a vendor to implement a Salesforce managed services agreement. The agreement would be a one to three-year contract renewable annually and fulfill the following needs:

• 10 hour a week dedicated Salesforce Architect level programmer with 3 years minimum experience, preferred 5 years’ experience

• 20 hour a week dedicated Senior Salesforce Consultant with 3 years minimum experience

⸰ Both positions must have a minimum of the following:

▪ Salesforce Admin. Certification

▪ Salesforce UX Designer Certification

• Both positions must have Expert knowledge in the following Applications:

⸰ Salesforce Service Cloud Enterprise Edition

⸰ Salesforce Communities Client Portal

⸰ Salesforce Marketing Cloud

⸰ Form Assembly

⸰ Salesforce Inbox

⸰ SF API integrations

▪ LearnWorlds Learning Management System

▪ State & Federal Agencies

⸰ Talend or other data integration tools

⸰ Blackthorn Events platform

⸰ Tableau

⸰ Demand Tools

⸰ XL-Connector

⸰ Elements.cloud

⸰ Jotform

⸰ Sign-now

**Proposal Requirement**

1. Provide a summary of the organization’s experience and qualifications.

2. Provide resumes of the key team members that will be involved in system management.

3. Will you utilize sub-contractors for the implementation and migration of this project?

4. Provide three customer references that you have worked with to implement Salesforce within the

last three years. Include customer name, contact name, phone number, and email address for each reference.

**Philosophy & Ethics**

1. Provide a measurement of client response times

2. Provide a summary of preferred client communication methods under a managed services agreement

3. Provide a summary of management practices (e.g. agile, SCRUM, waterfall, hybrid, etc.) and tools used for managing the project (e.g. Teamworks, Asana, Airtable, etc.)

4. Provide a summary of how tickets are tested

5. Provide a summary of if/how Sandboxes are used and if/how the Sandbox(es) interact(s) with our production environment

6. Provide definitions of billable and non-billable hours and how they are managed.

7. Provide a summary of how workload is managed during transition and/or vacation periods and how continuity is maintained to eliminate downtime.

8. Provide an outline of how vendor incidents are managed (e.g. vendor forgets to turn off automated email send)

**Pricing**

1. Provide a summary of fee structures, allocations and models

2. Clearly define preferred Terms of Agreement

3. Indicate flexibility of preferred terms defined

**PROPOSAL FORM**

**Salesforce Managed Services • RFP #222-51**

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

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

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

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

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

Supplier declares the following legal status in submitting this proposal:

A partnership

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

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

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

African-American Native American Woman/Women

Asian American Multi-Racial ADA Disabled Person(s)

Hispanic American

Supplier acknowledges receipt of the following addenda:

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

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

BASE PROPOSAL\_\_\_\_\_\_\_\_ATTACH\_YOUR PROPOSAL\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_dollars

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

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

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Company Name

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Address City/State/Zip Code

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Office Phone No. Mobile Phone No. Fax No.

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Authorized Agent Signature Name & Title

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

Witness Signature Name

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Tax Identification No. Date

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

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Authorized Agent Signature Name & Title

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Witness Signature Name

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Office Phone No. Cellular Phone No. E-mail

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GVSU Tax Identification No. Date