



*Opening doors to a better life*

## **REQUEST FOR PROPOSALS:**

### **Salesforce Managed Services**

**Deadline for submission:  
Friday, May 31, 2024 at 5 p.m. Pacific Time**



*Opening doors to a better life*

The Washington State Housing Finance Commission ("the Commission") intends to contract with one firm to provide Salesforce Managed Services between July 1, 2024, and June 30, 2026.

To this end, the Commission is releasing this Request for Proposals (RFP). The Commission may contract with one or more than one firm to provide the services described in this RFP. The Commission reserves the right to approve any and all subcontractors. It is the Commission's intent to appoint the firm or firms selected under this contract by June 21, 2024.

### **Background**

The Commission was created in 1983 as a financing conduit to make affordable housing available throughout the state of Washington through the use of mortgage revenue bonds. The Commission was given additional authority to issue non-recourse revenue bonds for cultural and social service projects and to issue bonds for beginning farmer/ranchers and energy projects. The Commission also allocates the federal housing tax credits for the state of Washington.

The Commission, located in downtown Seattle, employs approximately 80 staff members. Available on our website ([wshfc.org](http://wshfc.org)) is supplemental information about the Commission as well as recent publications. Printed copies can be obtained by contacting Matthew Vickery at 206-287-4450.

### **Current Salesforce Implementation**

Our current Salesforce implementation is the organizational source of data and is structured as follows:

- Accounts and Contacts of our main partners from all divisions of the Commission.
- Campaigns and Campaign Members to track training administered by Commission staff.
- Custom Objects related to the application for federal tax credits and bond cap.
- Custom Objects related to the tracking of some of the Bonds issued by the Commission.
- Custom Objects related to the compliance monitoring of successful applications.
- Custom Objects related to classes administered by our lending and real estate partners.
- Visualforce page used to create new records related to compliance monitoring.
- Visualforce page used to store data related to the budgets and costs associated with tax credit and bond applications as well as help create new records.
- Salesforce Experience site used by applicants for tax credits and bond cap to submit their application and supporting documentation.
- Salesforce Experience site used by lending and real estate partners to register classes as well as by the general public to register for a class.

The Commission is using the following third-party applications with our Salesforce instance: Conga Composer, Conga Batch, Conga Trigger, Campaign Monitor, Getfeedback, Laserfiche, and Ownbackup.

## **Expected Deliverables**

This Request for Proposal (RFP) consists of two primary tasks that the Commission requires the chosen vendor to undertake. The initial task involves providing support and maintenance for the existing platform, while the second task involves delivering new functionalities or updating existing ones.

### Support and Maintenance:

The Commission expects the selected vendor to help our Systems Admin deliver customizations and services such as:

- Responding to User Inquiries.
- Incident Management.
- User Access and Configuration.
- Creation/Deletion/Update of current automations, configurations, and customizations.
- Advise on apps to integrate and serve the Commission's needs.

### Delivering New Functionalities or Updating Existing Ones:

The Commission expects the selected vendor to work with our System Admin and other designated staff to implement new functionality based on outlined business processes and needs. Additionally, the selected vendor will work with our System Admin to identify any technical debt and to review functionality developed during the Commission's Salesforce implementation for possible updating or redesign.

Additional requests such as advisory services or expert advice may fall into the scope of this contract.

## **Terms of the Contract**

The term of the contract(s) will be for a two-year period: July 1, 2024, through June 30, 2026.

## **Minimum Qualifications**

Successful contractor(s) will have experience in the performance of similar work, in compliance with Commission requirements, and be licensed to do business in Washington state.

## **Contract Deliverables**

The Commission expects to receive the following deliverables from the contractor(s):

1. Professional services by qualified personnel.
2. Responsiveness to the Commission's requests and needs for each project.
3. Professional quality and a high degree of creativity on all projects.

4. All products become the exclusive property of the Commission, without qualification.
5. A positive and collaborative working relationship.

**Contractor Reporting**

The contractor(s) will be expected to meet on a periodic basis with the Salesforce Administrator to report on progress toward completing any specific projects under the contract.

**Contractor Amount**

Services will be performed according to an agreed-upon monthly fee and number of hours dedicated to Commission work. The monthly fee will include all development, quality assurance, testing, and project management.

**Method and Schedule of Contract Payment**

The Contractor will submit an invoice for payment at the beginning of the month following a month of services completed. The Commission will pay each invoice within 30 days in the form of a check mailed to the Contractor.

**Important Dates**

RFP Released	Friday, May 3, 2024
Written <i>Requests for Additional Information</i>	Wednesday, May 8, 2024
Written Q&A to be published in response to all <i>Requests for Additional Information</i>	Wednesday, May 15, 2024
<b>Proposal Delivery Deadline</b>	<b>Friday, May 31, 2024 5:00 p.m. Pacific Time</b>

**Instructions for Submitting Proposals**

One (1) electronic copy emailed to Matthew Vickery at [matt.vickery@wshfc.org](mailto:matt.vickery@wshfc.org) by 5:00 p.m. Pacific Time, Friday, May 31, 2024. Late proposals will not be considered.

**Proposals must be organized as follows:**

- I. **Cover letter** (limit: 2 pages)
- II. **Attachment I:** Applicant Questionnaire (limit: 2 pages)
- III. **Attachment II:** Experience, Personnel, Methodology and Costs (limit: 8 pages)
- IV. **References:** Three references who can speak to your work, including contact info.
- V. **Price Proposal:** The bid amount must proposed monthly and related number of hours as well as hourly rate for work beyond the contracted number of monthly hours.

**Page limits:** Pages must be letter-sized, with single-spaced text no smaller than 11 point. Submitted materials will not be returned to the applicants unless specifically requested.

## **Pre Bid Conference/Questions and Answers**

Questions regarding this RFP may be submitted to Matthew Vickery (contact information below) via email, however all responses will be posted on the wshfc.org website for all potential bidders to see. The first Q&A will be posted May 8, 2024, (provided questions have been submitted) and will be updated daily thereafter as necessary.

## **Criteria for Evaluating Proposals**

A review committee will evaluate the proposals according to these principal considerations:

1. Quality and clarity of the proposal.
2. Experience in developing creative materials from concept through completion.
3. Quality of work and degree of creativity.
4. Experience and background of staff assigned to the contract.
5. Fit with the goals and style of the Commission.
6. Responsiveness to the Commission's requests in a timely and professional manner.
7. The contractor's qualifications and ability to perform the services detailed in this RFP, as evidenced by previous work, other references, and the submitted proposal.

The Commission reserves the right to award this contract to the firm which will best meet these requirements. The Commission reserves the right to reject any or all proposals prior to execution of the contract, with no penalty to the Commission. All respondents will be notified by email of the selection.

## **Protest Procedures**

All protests, either against the solicitation of the RFP and/or the award of the contract, must be in writing and contain the original signature of the protesting party or an authorized agent. Such protests must state all facts and arguments on which the protesting party is relying as the basis for its action. Copies of the protest must be mailed or hand delivered to Steve Walker, Executive Director, Washington State Housing Finance Commission, 1000 Second Avenue, Suite 2700, Seattle, Washington 98104-3601.

The Commission must receive protests against the solicitation no later than June 28, 2024. Filing of a protest against the solicitation does not entitle the protesting party to an extension of time for submitting its proposal.

If the protest involves the rejection of a proposal, the protest must be received by the Commission no later than 5:00 p.m. on the fifth (5th) business day following applicant's receipt of the notice of rejection or the announcement of the successful applicant. Only those who did submit a proposal under the criteria established by the Commission may protest the rejection of a proposal.

The Executive Director of the Commission will consider the record and all the facts available and issue a decision within five business days of receipt of the protest unless additional time is required, in which case the protesting party will be notified by the Commission. The Executive Director's decision will be final.

### **Commission Support for the Contractor**

The Salesforce Administrator will assist in coordinating the work of the contractor with the Commission staff and other persons as required for the completion of the contract. The Salesforce Administrator will work with the contractor to complete the work program in a timely manner as required by the contract. Contractor is expected to provide their own materials and facilities necessary to complete the projects under this contract.

### **Contact**

All contact with the Commission by respondents to this Request for Proposals will be through:

**Matthew Vickery, Salesforce Database Administrator**  
**Washington State Housing Finance Commission**  
**Phone: (206) 287-4450**  
**[matt.vickery@wshfc.org](mailto:matt.vickery@wshfc.org)**

**ATTACHMENT I**

**REQUEST FOR PROPOSALS**

**Washington State Housing Finance Commission**

**APPLICANT QUESTIONNAIRE**

**(limit: 2 pages)**

- A. Name of the legal entity with which the contract is to be written.
  
- B. Names of the legal entities to be used as subcontractors (if applicable).
  
- C. Name, address, email and telephone of the principle officer of the applicant and subcontractor (if applicable).
  
- D. The legal status of the organization (contractor and subcontractors).
  
- E. Employer identification number.
  
- F. Washington State tax registration number (contractor and subcontractor).
  
- G. If the State of Washington engaged the contractor or subcontractor within the past 24 months, indicate the contract number and/or any other information available to identify the engagement.
  
- H. The location of the facility from which the contractor and subcontractors would operate.

## ATTACHMENT II

### REQUEST FOR PROPOSALS Washington State Housing Finance Commission

#### EXPERIENCE, PERSONNEL, METHODOLOGY and COSTS (8 pages maximum, not counting work samples)

##### A. Experience

1. Describe the qualifications of your firm and the individuals proposed to work on this contract. Provide a statement of your ability to perform the necessary work and meet the needs of the Commission.
2. Describe your firm's experience working with non-profit and public entities.
3. Describe and list your firm's experience during the past two years and include the following:
  - Name of the entity
  - Date of engagement
  - Person to whom you were responsible and phone/email contact info
  - Personnel from your firm who worked on the engagement
  - Links to work product, especially websites developed under the project.

##### B. Personnel

1. For each person who will be assigned to the Commission's contract, please describe his or her expertise in their role and responsibilities and the percentage of his or her time that would be devoted to the contract.
2. Describe any partnerships with other individuals or firms, including subcontracting relationships, that would be required to successfully complete this project.

##### C. Methodology

1. Describe your process for salesforce development and maintenance.
2. Your approach to and system of project management, i.e. setting and keeping to timelines, assigning tasks, tracking multiple sub-projects, etc.
3. Describe your experience and process for support, training, documentation and maintenance for the aftercare of deployed applications.

##### D. Costs

1. Provide a schedule of costs including hourly costs and estimates of hours/costs for each phase of the project.