



William Cass, P.E.
Commissioner

THE STATE OF NEW HAMPSHIRE
DEPARTMENT OF TRANSPORTATION

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David Rodrigue, P.E.
Assistant Commissioner

Andre Briere, Colonel, USAF (RET)
Deputy Commissioner

His Excellency, Governor Christopher T. Sununu
and the Honorable Executive Council
State House
Concord, New Hampshire 03301

Executive Office
June 3, 2024

REQUESTED ACTION

Governor and Council has directed agencies to request review and approval when a Salesforce Master Service Agreement exceeds \$250,000. The Department of Transportation intends to utilize the extended Master Service Agreement contract (8002977) with Slalom, Inc (Vendor 318836) by increasing the contract amount by \$650,000 from \$1,500,000 for a new contract amount not to exceed \$2,150,000 for the purpose of further developing Department of Transportation permits as part of the Statewide ePermitting system, effective upon Governor and Council approval. The original contract agreement was approved by Governor and Council on November 29, 2023, Item #30A, 100% Federal Funds.

Funds are available in the following account for State FY 2025:

04-96-96-960515-2674	<u>FY 2025</u>
ARP Investments in Ops Tech	
046-500463 Eng Consultants Non-Benefit	\$650,000

EXPLANATION

On, November 29, 2023, Governor and Council approved the original work with Slalom LLC to further develop DOT permits. As part of the original work, the Department of Transportation has both significantly improved the Driveway and Right of Way Activities permit types, developed Special Events and Sponsor a Highway permit types as well as added significant platform functionality that other state agencies can use. This amendment will add enterprise mapping solutions, further improve permit functionality, and allow the Department of Transportation to pursue additional permit types. The requested amendment will not change the original RFQ scope of work (attached).

Your approval of this contract is respectfully requested.

Sincerely,

William J. Cass, PE
Commissioner

Attachments



STATE OF NEW HAMPSHIRE
DEPARTMENT OF INFORMATION TECHNOLOGY
27 Hazen Dr., Concord, NH 03301
Fax: 603-271-1516 TDD Access: 1-800-735-2964
www.nh.gov/doit

Denis Goulet
Commissioner

April 18, 2024

William J. Cass, Commissioner
Department of Transportation
State of New Hampshire
7 Hazen Drive
Concord, NH 03301

Dear Commissioner Cass:

This letter represents formal notification that the Department of Information Technology (DoIT) has approved your agency's request to enter into a contract amendment with Slalom, Inc., as described below and referenced as DoIT No. 2024-036A.

The purpose of this request is to continue to provide further development of Department of Transportation permits as part of the Statewide permitting system.

The Total Price Limitation will increase by \$650,000 for a New Total Price Limitation of \$2,150,000, effective upon Governor and Council approval through December 31, 2026.

A copy of this letter must accompany the Department of Transportation's submission to the Governor and Executive Council for approval.

Sincerely,

A handwritten signature in black ink, appearing to read "Denis Goulet", with a horizontal line extending to the right.

Denis Goulet

DG/jd
DoIT #2024-036A

cc: Charles Burns, IT Manager



Work Order #2

State of New Hampshire

RFQ #387-24 ARPA ePermitting Salesforce Public Sector Foundation for ePermitting Implementation for Department of Transportation

May 31, 2024

This Work Order describes the ways of working between the State of New Hampshire (SoNH) and Slalom, Inc. (Slalom), in support of the RFQ #387-24 ARPA ePermitting Salesforce Public Sector Foundation for ePermitting Implementation for Department of Transportation. This document describes:

- How Slalom will work with the SoNH to define scope, deliver services, acquire feedback, and gain approvals.
- How Slalom will share progress and report on budget and development velocity.
- Periods of time when Slalom and SoNH will assess team size and determine if any adjustments need to be made (e.g., number or type of resources).

1. DESCRIPTION OF WORK

Project Overview / Objectives

The New Hampshire Department of Transportation (DOT), the Department of Information Technology (DoIT), and the State of New Hampshire (SoNH) need to transform and modernize its permitting process onto the Salesforce platform for public and internal use. The DOT needs to build the solution to fit into the broader New Hampshire Permit Portal experience while providing its users access to the unique tools they need to apply for many type of permits - pole licenses, sponsor-a-highway applications, sign permits, parade permits, road and bridge off-highway vehicle/snowmobile permits, transit stop location permits, message board requests, and others. To this end, the SoNH has engaged Slalom to help design and build an Esri-Salesforce integration for maps (based on the requirements of up to 4 agencies and built for DOT and designed to scale to other agencies in later engagements), design and build permits for signs and poles, and continue to build additional permits and features as budget allows and priorities and value dictate.

Scope and Deliverables

This project will be managed using agile methodologies, which starts with discovery to define initial scope, estimate user stories, and prioritize user stories into release plans. Build is iterative and user focused, based on short "Sprints" which deliver business value while focusing on longer term efforts. The release plan and product backlog inform Sprint planning and prioritization and include story point estimates of velocity for build/planned work and contingency work. Any described scope herein is directional and is reviewed as part of the bi-weekly sprint meetings. Proposed changes pass through a project documented change process and account for like-kind trade-offs in terms of story points sizing or revisions to the timeline. Product backlog will be used for feature selection and development. Additional features not already included in the product backlog or defect resolution will be evaluated by Slalom and the Client and, if deemed appropriate, will be added to the backlog, prioritized, and considered for implementation. The features and functionality delivered are constrained by the available capacity, velocity (story points) and disciplines of the deployed resources. Slalom proposes the following actions and deliverables as part of this work order.

#	Activity	Deliverables	Description	Slalom Responsibilities	Client Responsibilities
1	Program management	- Program Kickoff - Bi-weekly project status reports - Steering committee status updates	- Define and deliver the 'Big 3' - Program Machine, Org & Role Clarity, and Measured Progress - Monthly reviews of team-size to assess whether it is appropriately staffed (i.e., has the right resources, the right number or resources, and the right skillsets) - Quarterly reviews of what's been delivered to date and what's prioritized for upcoming	- Work with DOT and DoIT to ensure all resources understand how, when, and where to document and manage issues, risks, decisions, scope, and progress - Schedule and conduct bi-weekly status update meetings - Attend and participate in Steering Committee meetings	- Identify stakeholders needed for Program Kickoff, Weekly Status reports, and Steering Committee updates, and ensure required level of participation from all client stakeholders - Resolve any escalations and organizational barriers impeding progress
2	Discovery and Design	High-level definition of epics and features	Understand business process, use cases, workflows, and requirements for Esri maps, Signs and Poles permits, and/or other prioritized permit workflows.	- Schedule and lead process definition and requirements gathering discovery sessions with up to 4 agencies for the Esri-Salesforce integration - Schedule and lead process definition and requirements gathering discovery sessions for sign and pole permits - Collaborate with Esri to align on maintenance responsibilities and ownership	- Provide future state process flow documentation - Identify correct stakeholders to attend Slalom-led discovery sessions - Coordinate and contract with Esri resources to jointly review cross-agency requirements, provide answers to inform technical implementation feasibility, and align on a solution approach
3	Bi-weekly Agile "Working Sprints"	A scalable, tested, Salesforce and Esri solution	Execution of software development activities which include: - Build-ready stories - Sprint planning & grooming - Daily standups - Unit testing - Peer review of build prior to commit where applicable - In-sprint testing - Mobile validation on one responsive view for permits - Commit to repository and deploy to in-sprint testing environment(s) - Sprint demos and retrospectives	- Facilitate agile ceremonies - Document /refine user stories and acceptance criteria - Leverage existing and create new backend to enable user stories - Build/enhance the existing DOT maps solution to deliver the solution with incremental features (e.g., state-owned roads rendering), on a mutually agreed upon architecture foundation	- Provide input to sprint planning and standups - Provide design feedback and approvals - Product owner approves acceptance criteria and priorities within sprint - Participate in sprint demo sessions - Participate retrospectives - Perform any necessary data migration and integration design, development and resource management. Data migration could include but is not limited to the migration of geolocation information into a new object model. - Sign-off on completed user stories.
4	User Acceptance Testing (UAT)	- UAT Test Scripts - Execution of UAT	For functionality deemed as requiring UAT by the business, activities to include: - UAT Session(s) - UAT test scripts - Execution of UAT by the business - Prioritization of bugs/enhancements	- UAT test scripts with testing instructions for users to validate that the solution is working as expected, as defined by the user story acceptance criteria - Facilitates and organizes UAT	- Execution of delivered UAT test scripts in a UAT Sandbox - Prioritization of bugs/enhancements - Training documentation - quick reference guide

#	Activity	Deliverables	Description	Slalom Responsibilities	Client Responsibilities
5	Production Cutover Plan & Hypercare	- Deployment plan - Support plan - Resolution of critical defects	Documented and aligned to process for roll out of features to Production. Activities to include: - Go, no-go decision meeting for net-new features (e.g., new permits) - Smoke testing - Regression validation - Rollback strategy - Deployment plan - Support plan	- Go, no-go recommendation - Smoke testing - Advisement on rollback strategy - Deployment plan, inclusive of pre/post manual deployment steps - Partnership on support plan	- Go, no-go decision - Smoke testing support - Collaboration on rollback strategy - Communication Plan - Training - Partnership on support plan

Key Roles and Responsibilities

Slalom and SoNH will review the key roles monthly and add or remove roles to accommodate changing needs (i.e., eSignature, business architecture, or other roles not yet defined in the table below).

Role	Responsibility	Responsible Party
State Program Manager	Provides executive direction to the program and serves as an escalation path for project issues putting the program at risk. Provides input and direction to the ePermitting team.	SoNH (part-time)
Subject Matter Experts	Subject matter experts (e.g., Driveways, Right of Way Activities, Parade, Signs, Poles, and Esri) would be engaged to provide input and feedback during the discovery and development process.	SoNH (part-time)
Product Owner	Primary interface to the Slalom Program Manager and Salesforce Technical Architect. Responsible for direction, serving as the voice of business requirements, and access to key stakeholders. Works with the team to: - Review drafted user stories and acceptance criteria - Approve user stories and acceptance criteria to ensure they satisfy the business's requirements - Provide input to sprint planning and designs, as well as participate in stand-ups, demos and retrospectives - Sign-off on completed user stories - Partnership with Salesforce Business Analyst & QA Lead on User Acceptance Testing (UAT) test scripts and provides final sign-off - Train users and manage change	SoNH (full-time)
Esri Specialist	- Participate in Cross Agency Map Use Cases Discovery and Esri-Salesforce Integration Solution Design sessions - Collaborate with DoIT and Slalom on a desired integration solution design - Partner with DoIT and Slalom on determining which system (Esri vs. Salesforce) will be used to render and configure the webmap look and feel - Identification and alignment of Esri resources as appropriate based on integrated solution decisions made during Discovery & Design	Esri (part-time)
Salesforce Technical Architect	- Owns Salesforce architecture for permits, manages all development activities and development resources. - Partners with Product Owner, Business Analyst and Program Manager to ensure that each prioritized user story has a documented estimated	Slalom (full-time)

Role	Responsibility	Responsible Party
	level of effort and solution, leveraging OOB PSS functionality to address requirements. When/where OOB functionality cannot address requirements, the Salesforce Technical Architect works with the Product Owner, Program Manager and the Technical Subject Matter Expert to escalate accordingly and propose alternative solutions where necessary.	
Salesforce Technical Architect, Salesforce-Esri	Owns Salesforce-Esri architecture for the program, manages all development activities and development resources. Partners with Product Owner, Business Analyst and Program Manager to ensure that each prioritized user story has a documented estimated level of effort and solution for the Salesforce-Esri integration.	Slalom (full-time)
Salesforce Technical Architect - DevOps/Architecture /Esri Subject Matter Expert	Provides guidance and thought leadership in technical areas including DevOps, Esri, and Salesforce architecture decisions.	Slalom (part-time)
Program Manager	Partner with client leadership to drive successful project delivery and serve as an escalation point. - Responsible for end-to-end delivery of the engagement to make sure the business and technical objectives are met. - Manages all project team members (including dedicated client resources) to ensure the team is meeting expectations, deadlines, and deliverables. - Leads the planning and scheduling of discovery sessions and supports BA and Technical Architect in discovery as needed. - Oversees creation of business and technical user stories (in collaboration with Technical Architect) and works with Product Owner and BA to prioritize user stories for each sprint. - Provides Weekly Status updates to project stakeholders, participates in Steering Committee meetings, manages issue/risks to resolution. - Coordinates, schedules, and leads agile ceremonies (Scrum, Demos, etc.), and tracks team capacity and velocity.	Slalom (full-time)
Scrum Master, Salesforce-Esri	Partner with the Program Manager to drive successful project delivery and serve as an escalation point. - Manages Salesforce-Esri project team members (including dedicated client resources) to ensure the team is meeting expectations, deadlines, and deliverables. - Leads the planning and scheduling of discovery sessions and supports BA and Technical Architect in discovery as needed. - Oversees creation of business and technical user stories (in collaboration with Technical Architect) and works with Product Owner and Salesforce-Esri BA to prioritize user stories for each sprint. - Coordinates, schedules, and leads agile ceremonies (Scrum, Demos, etc.), and tracks team capacity and velocity for Salesforce-Esri.	Slalom (full-time)
Program Manager - Transportation Subject Matter Expert	Provides transportation trends & best practices, industry insights, and points of view. Provides input and direction to the solution and future state vision to support the core team.	Slalom (part-time)
Program Manager - Accountable Executive	As the accountable leader for program delivery, provides executive direction to the program and serves as an escalation path for project issues that would put project delivery at risk	Slalom (part-time)
Salesforce Business Analyst - Business Analyst and QA Lead	- Drafts user stories with acceptance criteria, with input and review by business subject matter experts and Product Owner. - Leads development and technical teams through regular backlog refinement.	Slalom (full-time)

Role	Responsibility	Responsible Party
	- Documents functional test cases/scripts and delivers test plan. - Executes in-sprint testing. - Prepares UAT test scripts and organizes and facilitates UAT sessions for end-user validation.	
Salesforce Business Analyst - Business Analyst and QA Lead, Salesforce-Esri	- Drafts user stories with acceptance criteria, with input and review by business subject matter experts and Product Owner. - Leads development and technical teams through regular backlog refinement. - Documents functional test cases/scripts and delivers test plan. - Executes in-sprint testing. - Prepares UAT test scripts and organizes and facilitates UAT sessions for end-user validation.	Slalom (full-time)
Salesforce Platform Developer - Configuration Consultants	Collaborates with Technical Architect to understand technical solution for prioritized user stories, completes development, and conducts smoke-testing in dev and test environments.	Slalom (full-time)
Salesforce Platform Developer - Configuration Consultants, Salesforce-Esri	Collaborates with Technical Architect-Esri to understand technical solution for prioritized user stories, completes development, and conducts smoke-testing in dev and test environments.	Slalom (full-time)

2. Project Assumptions

The in-scope Services, anticipated project duration, planned outcomes and fee estimate are based on the following assumptions, including Client's execution of its responsibilities. Any incorrect assumption or delay or nonperformance of the Client responsibilities may result in delays or Slalom's inability to perform its responsibilities.

Engagement and acceptance:

- This work order and associated Services rendered are offered on a Time & Materials basis. The goal is to advance the program on a sprint-by-sprint basis resulting in production-ready Salesforce enhancements by the end of each sprint. For Time & Materials engagements, Slalom will endeavor to complete the in-scope objectives described in this work order within the budget allotted in the purchase order. However, no assurance can be given that such objectives will be met. As a Time & Materials engagement, changes to deliverables constitute billable project time unless it is determined that the Services and related Work were not performed in accordance with this work order and good commercial practices.
- The State has approved the Slalom resources as having the skillsets required to deliver this program.
- Sprint delivery acceptance occurs when the Product Owner approves that the delivered functionality meets the acceptance criteria via regular Sprint Demos.

Ways of working:

- Slalom and Client will perform monthly reviews of team-size to assess whether it is appropriately staffed (i.e., has the right resources, the right number of resources, and the right skillsets).
- Slalom will work mostly remotely but will be available for periodic in-person meetings (e.g., around milestones).
- Slalom will utilize reasonable efforts to retain and maintain assigned resources throughout this project. Slalom reserves the right to utilize resources that were not originally assigned to the project. In the event Slalom chooses to change, remove, or add resources to the project, Slalom will review resource updates with Client.
- Slalom will not be responsible for delays solely caused by the acts or omissions of Client or Client-affiliated third-party resources, including their failure to execute the Client responsibilities.

- Slalom will not be responsible for Client's failure to execute Client's responsibilities.

Esri:

- Client will contract with Esri prior to engagement start.
- Esri, SoNH Esri resources, and other applicable agency SMEs will be available across the discovery and design timeline and, as applicable, across the build and test timeline.
- Functionality built will be focused on DOT maps requirements.

Salesforce:

- Slalom shall have continued reasonable access to necessary State environments, technology, data, and resources for State application development and deployment, using State system environments only as necessary to provide the services.
- Salesforce internal and portal user licenses, as well as any additional licenses needed (e.g., Copado) will be purchased and available two weeks before the sprint when Slalom would be required to build.
- The solution will be built in English only.
- Slalom will be responsible for executing in-sprint testing and will lead User Acceptance Testing (UAT) with partnership from the NH DOT Product Owner.
- The solution will be built with Salesforce out of the box (OOTB) functionality. If OOTB functionality does not satisfactorily meet business requirements, Slalom and Client will together determine the most appropriate solution options to achieve business outcomes inclusive of business process changes.
- Slalom assumes that NHDOT public facing users and employees will be accessing Salesforce via browser for Desktop and Mobile.
- Salesforce's native product accessibility and mobile functionalities will be embedded in our declarative solution. If, throughout the duration of the engagement, NHDOT and Slalom deem accessibility and/or mobile testing necessary and additional testing resources are needed from Slalom, Slalom will submit a request for approval of additional resources.

Warranty:

- The Salesforce Professional Services Agreement between Slalom and SoNH Section xi Warranty Services calls for 24x7 support with on-site support within 4 hours for any warranty claim. Slalom commits to addressing warranty claims within normal business hours. We will work with the State to triage the issue, develop a plan for remedy including timeframe, and agree with the State whether Slalom staff will work on-site or remotely. In practice, the SoNH has set expectations that any issue post go-live will be addressed first by the SoNH Salesforce platform team, second by the enterprise signature support structure provided by Salesforce, or third by Slalom. In the event that Slalom needs to provide ongoing support of the Salesforce platform, we will provide an estimate of cost to be provisioned in a new purchase order.
- The Salesforce Professional Services Agreement between Slalom and SoNH Section xi Warranty Services calls for "correcting all errors, and defects and deficiencies." For the purposes of this RFQ, warrantable errors, defects, and deficiencies are limited to Severity 1 defects that are caused by faulty workmanship (i.e., documented defects that cause complete application failure or application unavailability; application failure or unavailability in one or more of Authorized Users locations; or systemic loss of multiple essential system functions).
- Professional Services Agreement Slalom has an existing Professional Services Agreement for Salesforce services with the State of New Hampshire and our proposal assumes that we will be able to contract under the existing agreement, which has already been negotiated.

Client responsibilities:

- Client will identify 4 representative agencies and SMEs that will provide enough representative use cases/requirements through participation in Discovery/Design to enable the solution implemented to scale for the State. These SMEs will participate in Sprint Demos and in User Acceptance Testing (UAT).
- Client will provide NH Esri SMEs as required to provide direction on and make updates to (as/if necessary)

existing map layers for the State of New Hampshire in order to meet business requirements.

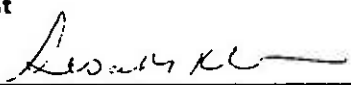
- Client will own and manage the security of production workloads.
- Client will assume responsibility for the quality of data sourced from Client business applications. Any data cleansing or changes needed in source system data are to be performed by Client resources - this includes data migration, which could include but is not limited to the migration of geolocation information into a new object model to accommodate the GIS Maps solution.
- Client will provide appropriate locations on Client infrastructure for all regulated and/or sensitive data. All regulated and/or sensitive data will remain within designated Client infrastructure. Slalom will not use other infrastructure for this purpose.
- Client will designate and provide access throughout the project to the Client individuals serving in project support roles, including the project sponsor and stakeholders, each having suitable skills, experience knowledge, capacity, and subject matter expertise for their role.
- Client will provide promptly such information, documentation, decisions, approvals, and assistance as requested or necessary for Slalom's performance and maintenance of project cadence.
- Client is responsible for ensuring that all Slalom activities described in this work order, including such additional activities as may be approved after its execution, comply with any agreement to which Client is a party or is otherwise bound, with any of its organization documents.
- Client is responsible for making all decisions in regards to its security policies, document retention policies and processes, best practices, auditing, holds, and discovery, and all related governance matters. Client is responsible for consulting with its legal counsel or other advisors in regards to such matters as necessary.
- Client is responsible for deployments of metadata into UAT, Staging and Production environments.
- Client is responsible for organizing and executing System Integration Testing (SIT), Regression Testing and any applicable security testing. Client will execute User Acceptance Testing (UAT) test scripts.
- Client is responsible for all integrations (e.g. Microsoft Access, Oracle, Payment Gateway).
- Client is responsible for communication planning and all end user training activities.

3. DURATION OF WORK/SCHEDULE

Services under this work order are expected to begin on or around June 24, 2024, contingent on the Governor and Council process, and continue until the available budget of \$650,000 is exhausted or the value proposition has been exhausted.

IN WITNESS WHEREOF, the duly authorized representatives of the Parties hereto have caused this work order to be duly executed.

Client

By: 

Print: Susan M. Kleson

Title: Director of Operations

Date: 6/5/2024

Slalom

By: 

By: Russell D. Norris [May 31, 2024 14:08 EDT]

Print: Russell D. Norris

Title: GM

Date: May 31, 2024

NH DOT Salesforce-Esri Integration Work Order

Final Audit Report

2024-05-31

Created:	2024-05-31
By:	Nate Higgins (nate.higgins@slalom.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAGZGjNKZ0ofbbZ86ERsxXzn_9FFa2LTId

"NH DOT Salesforce-Esri Integration Work Order" History

-  Document created by Nate Higgins (nate.higgins@slalom.com)
2024-05-31 - 6:03:00 PM GMT - IP address: 76.19.251.149
-  Document emailed to Russell D. Norris (russelln@slalom.com) for signature
2024-05-31 - 6:03:56 PM GMT
-  Email viewed by Russell D. Norris (russelln@slalom.com)
2024-05-31 - 6:08:23 PM GMT - IP address: 172.225.174.206
-  Document e-signed by Russell D. Norris (russelln@slalom.com)
Signature Date: 2024-05-31 - 6:08:41 PM GMT - Time Source: server - IP address: 24.147.162.91
-  Agreement completed.
2024-05-31 - 6:08:41 PM GMT

New Hampshire
Department of Transportation

Signature

Name

Title

NH Attorney General

Governor and Council
Approval

Secretary of State

Dated

State of New Hampshire

Department of State

CERTIFICATE

I, David M. Scanlan, Secretary of State of the State of New Hampshire, do hereby certify that SLALOM, INC. is a Delaware Profit Corporation registered to transact business in New Hampshire on June 01, 2020. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: 843174

Certificate Number: 0006668329



IN TESTIMONY WHEREOF,
I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 15th day of April A.D. 2024.

A handwritten signature in black ink, appearing to read "David M. Scanlan".

David M. Scanlan
Secretary of State

Certificate of Authority

I, James D. Mitchell, certify that I am the duly elected Secretary of Slalom, Inc., a corporation organized under the laws of the State of Delaware ("Slalom").

I further certify that Russell Norris is the General Manager of Slalom and is authorized on behalf of Slalom to sign and submit Work Order 2 to the Agreement for Salesforce Professional Services between Slalom, Inc. and the State of New Hampshire, Department of Administrative Services No. 8002977 on behalf of Slalom.

I hereby certify that this authority has not been amended or repealed and remains in full force and effect as of the date of the contract/contract amendment to which this certificate is attached. This authority was valid thirty (30) days prior to and remains valid for thirty (30) days from the date of this Certificate of Authority. I further certify that it is understood that the State of New Hampshire will rely on this certificate as evidence that the person(s) listed above currently occupy the position(s) indicated and that they have full authority to bind the corporation. To the extent that there are any limits on the authority of any listed individual to bind the corporation in contracts with the State of New Hampshire, all such limitations are expressly stated herein.

This 10th day of June 2024.

James D. Mitchell
James D. Mitchell (Jun 10, 2024 12:07 PDT)

James D. Mitchell



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/20/2023 ..

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MARSH USA, LLC. 1301 5th Avenue, Suite 1900 Seattle, WA 98101 Attn: Seattle.CertRequest@marsh.com	CONTACT NAME: PHONE (A/C No, Ext): FAX (A/C, No): E-MAIL ADDRESS:
CN102866506-Slat-GAWUP-24-25	INSURER(S) AFFORDING COVERAGE INSURER A : Federal Insurance Company INSURER B : ACE American Insurance Company INSURER C : N/A INSURER D : INSURER E : INSURER F :
INSURED Slalom, Inc. 821 Second Ave, Suite 1900 Seattle, WA 98104	NAIC # 20281 22667 N/A

COVERAGES

CERTIFICATE NUMBER:

SEA-003888103-02

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER: AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ NON-OWNED AUTOS ONLY		36078470	01/01/2024	01/01/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 100,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$ COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB EXCESS LIAB DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	71836942	01/01/2024	01/01/2025	X PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Exhibit of Insurance

CERTIFICATE HOLDER

CANCELLATION

State of New Hampshire Administrative Services, Bureau of Purchase and Property 25 Capital Street, Room 102 Concord, NH 03301	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Marsh USA LLC</i>
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THE STATE OF NEW HAMPSHIRE
DEPARTMENT OF TRANSPORTATION



Ham
30A

William Cass, P.E.
Commissioner

David Rodrigue, P.E.
Assistant Commissioner
Andre Briere, Colonel, USAF (RET)
Deputy Commissioner

His Excellency, Governor Christopher T. Sununu
and the Honorable Council
State House
Concord, New Hampshire 03301

Executive Office
November 15, 2023

REQUESTED ACTION

Authorize the Department of Transportation to enter into a project agreement with Slalom, LLC. (VC# 318836) utilizing Statewide contract 8002977 under the Department of Administrative Services Statewide Master Agreements, for Salesforce Professional Services, in an amount not to exceed \$1,500,000, for the purpose of developing DOT permits as part of the Statewide permitting system, effective upon Governor and Council approval through December 31, 2026. The Governor and Executive Council approved the Salesforce Professional Services Contracts on October 13, 2021, item #99. Source of Funds: 100% Federal Funds

Funding is available in State Fiscal Year 2024 as follows:

Funding is available as follows:	<u>FY 2024</u>
04-96-96-960515-2674	
ARP Investments in Ops Tech	
046-500463 Eng Consultants Non-Benefit	\$1,500,000

EXPLANATION

DOT is part of a Statewide Permit System project. The project is transitioning from Salesforce professional services provided by solutions integrators included in the Salesforce contract. The purpose of this agreement is for Slalom LLC to develop additional permits for DOT in support of the Statewide Permit System project.

Contractor submissions were scored by a technical review team and Slalom LLC was identified as the high scoring vendor. Further details are included with this letter in the Scoring Memo.

The Department of Transportation requests approval of this project agreement with Slalom, LLC.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "William Cass". The signature is fluid and cursive, with a large initial "W" and a long, sweeping underline.

William J. Cass, P.E.
Commissioner

BC/
DoIT Project Number: RFQ 387-24
Attachments



STATE OF NEW HAMPSHIRE
DEPARTMENT OF INFORMATION TECHNOLOGY
27 Hazen Dr., Concord, NH 03301
Fax: 603-271-1516 TDD Access: 1-800-735-2964
www.nh.gov/doit

Denis Goulet
Commissioner

November 15, 2023

William J. Cass, Commissioner
Department of Transportation
State of New Hampshire
7 Hazen Drive
Concord, NH 03301

Dear Commissioner Cass:

This letter represents formal notification that the Department of Information Technology (DoIT) has approved your agency's request to enter into a contract with Slalom, LLC, as described below and referenced as DoIT No. 2024-061.

The purpose of this request is for the development of DOT permits as part of the Statewide permitting system.

The Total Price Limitation will be \$1,500,000, effective upon Governor and Council approval through December 31, 2026.

A copy of this letter must accompany the Department of Transportation's submission to the Governor and Executive Council for approval.

Sincerely,

Denis Goulet

DG/jd
DoIT #2024-061

cc: Charles Burns, IT Manager

STATE OF NEW HAMPSHIRE

INTRA-DEPARTMENT COMMUNICATION

DATE: November 14, 2023

FROM: Charlie Burns, DOT IT Lead
Jeff Harpring, Project Manager

SUBJECT: DOT RFQ 387 24 ARPA ePermitting

TO: William Cass, Commissioner
Dave Rodrigue, Assistance Commissioner
Mike Servetas, Director of Operations

Memorandum

This Memorandum transmits scores for the DOT RFQ 387 24 ARPA ePermitting RFQ and recommends that DOT enter into a contract with Slalom for \$1,500,000. The DOT Statewide Permit Software Committee (Committee) determined that Charlie Burns and Jeff Harpring (Scoring Team) would score the RFQs. Per the RFQ, scoring was based on the following criteria:

- 1) Ability to meet "Mandatory Expertise or Contractor Qualifications" – 30 Points
- 2) Ability to meet "Key Staff Required with Subject Matter Expertise" – 20 Points
- 3) Optional interviews as deemed necessary by the State – 20 Points
- 4) Total cost/best value – 30 Points

Methodology

The Scoring Team evaluated and independently arrived at a preliminary score for each proposal. After this independent review period, the Scoring Team met to compare and discuss the preliminary scores. The preliminary scores closely matched, and the scores were averaged. Thereafter, the optional interviews were conducted on November 9th and 13th.

Relative to the other vendors, Spruce lacked sufficient Public Sector Foundation (PSF) experience. The Scoring Team strongly believed that experience with PSF was critical to the success of the project. Based on the lack of relevant PSF experience, Spruce was not invited to the interview process. While Spruce was the cheapest respondent, it is unlikely that the Scoring Team would recommend hiring Spruce even if they were the only vendor that applied.

Proposal Scores

	Available Points	Slalom	MTX	
Mandatory Expertise or Contractor Qualifications	30	24.5	16.75	6.5
Key Staff Required with Subject Matter Expertise	20	14.5	11.25	8
Optional Interviews	20	18	10	N/A
Total cost/best value – 30 Points	30	25	22	30
Total	100	82	60	N/A

Cost

Cost was especially difficult to ascertain as this project uses Agile development. The Scoring Team recommends that \$1,500,000 in funds be allocated for the project based on the existing permit costs. The expenditure of the funds should be closely monitored by both the Committee as well as the Oversight Team for the project. The Committee recommends starting with improvement to the Driveway and ROW Activities Permit and then the Parade Permit. Once the Parade Permit is launched, the Committee should prepare an in-depth review of costs to ensure that any additional permit costs are justified by the additional benefits to the public.

27 October 2023

State of New Hampshire

RFQ # 387-24 ARPA ePermitting Salesforce Public Sector
Foundation for ePermitting Implementation for Department of
Transportation

State of New Hampshire
Department of Administrative Service
Bureau of Purchase and Property
25 Capitol Street, Room 102
Concord New Hampshire 03301

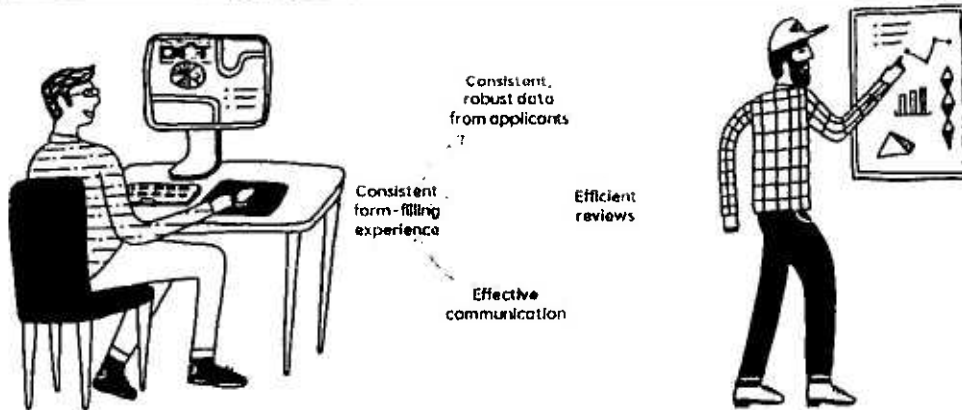
Slalom, Inc.
399 Boylston St #1000
Boston, MA 02116
(617) 316-5400

slalom

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1 Introduction

Imagine a future where...individuals and businesses can approach the New Hampshire Permitting Portal, enjoy a seamless sign-on, find the DOT-related permits they need, fill them out with ease, and send them along for an efficient review. The applicant is impressed. The DOT saves time. The state gets accolades for its customer focus.



The New Hampshire Department of Transportation (DOT), the Department of Information Technology (DoIT), and the State of New Hampshire (SoNH) need to transform and modernize its permitting process onto the Salesforce platform for public and internal use. The DOT needs to build the solution to fit into the broader New Hampshire Permit Portal experience while providing its users access to the unique tools they need to apply for many type of permits - pole licenses, sponsor-a-highway applications, sign permits, parade permits, road and bridge off-highway vehicle/snowmobile permits, transit stop location permits, message board requests, and others. We understand DOT needs to advance this work in the context of the following mission and goals:

- **The DOT needs to become more efficient.** DOT has had staff shortages due to an aging workforce, shorter tenures, and a competitive marketplace for talent. Permit applications are hard to plan for and require effort to process beyond engineers' and planners' day to day responsibilities. The DOT is faced with doing more with less; this makes efficiency critically important.
- **The DOT needs to meet its purpose.** DOT has an important job of enhancing economic development and preserving the quality of life in the SoNH. DOT reviewers need the ability to have a holistic, accurate view of all permit data and associated transactional data at any given point in time to make better, more informed decisions that help it meet its purpose.
- **The DOT needs to build a system that fits into the broader context of the New Hampshire Permit Portal.** The SoNH is building a New Hampshire Permit Portal that gives individuals and businesses access to everything the state offers. It needs the DOT ePermitting system to tie into the broader enterprise (e.g., logins for consulting engineers and individuals work across DOT, Department of Environmental Services [DES], and other agencies). DoIT would like to easily enhance and maintain the statewide solution, enabling new agencies to include new permit types.

To deliver the ePermitting outcomes need by the SoNH, DoIT, and DOT, a partner must:

- **Know Public Sector Foundations (PSF).**¹ Despite Salesforce PSF capability being relatively young, Slalom has 60+ Salesforce resources experienced in PSF and we have a Slalom-built 6-week Public Sector Foundation Solution Series to continue to accelerate the rapid growth of our resources with PSF experience.

We have recently implemented/are implementing 12+ solutions across the country where we have converted manual or non-existent processes to Salesforce PSF (e.g., Massachusetts DOT, Nevada Department of Motor Vehicles, California Department of Motor Vehicles, and Minnesota Department of Human Services childcare licensing). The 'Expertise Qualifications' tab of the Vendor Information Workbook includes details on many of our recent PSF solutions.

Slalom has 'Navigator Expert' status in Public Sector – achieving the highest level of certification in the technology. We participate in product release readouts with the Salesforce product team members and have a voice to influence the PSF product roadmap.

- **Know Salesforce technology inside and out and know how to build those solutions for DOTs.** Slalom is Salesforce's #1 partner globally as of the first half of 2023. We have proudly earned Salesforce Platinum Consulting Partner status - the top Salesforce partner status available reserved for Salesforce's most elite partners - and have consistently been named a Top 5 partner for Public Sector State and Local Government.

Beyond the PSF solutions described above, Slalom has built several Salesforce solutions for transportation agencies, including several for Massachusetts DOT (i.e., constituent correspondence, drone mission requests, and legal matter management), one unified client relationship management (CRM) solution for a major Transit Agency in the Northeast, managing the Salesforce implementation for the Metropolitan Transportation Commission (MTC) in the Bay Area, and alternative fuels safety workorder solution for the Railroad Commission of Texas.

- **Know more than just technology:** Slalom offers the full suite of services needed to deliver technology projects successfully. We have designed our firm to deliver important technology products to our clients (i.e., strong technology Agile project management skills, business process mapping and design, change management and training, integrations, visual analytics, and more). We have a large delivery leadership practice - this is the team that will manage the engagement, document the business processes, check the software for quality, and navigate the agile ceremonies while upskilling DOT and DoIT staff. We have a strong organizational effectiveness team that provides user training but can also think holistically about how the new technology fits within the DOT, DoIT, and SoNH. We bring strong integrations engineers and data visualization engineers who can help the DOT and DoIT integrate the system into the broader SoNH context and visualize results.

¹ Public Sector Foundations (PSF) is Public Sector Solutions (PSS). PSS reflects the phrasing found in current Salesforce industry materials. In this RFQ response, the terms are used interchangeably.

2 Slalom's Experience and Qualifications

2.1 Slalom's Experience

Slalom is a purpose-led, global business and technology consulting company. From strategy to implementation, our approach is fiercely human. In 8 countries and 45 markets, we invest in deeply understanding our clients—and their constituents—to deliver practical, end-to-end solutions that drive meaningful impact. Backed by close partnerships with over 400 leading technology providers, our 12,000+ experts help people and organizations dream bigger, move faster, and build better tomorrows for all. We are honored to be consistently recognized as a great place to work, including eight or more consecutive years as one of Fortune's 100 "Best Companies to Work For," the Boston Globe "Top Places to Work," and the Boston Business Journal "Best Places to Work."

Slalom has a record of helping state, city, county, and federal agencies engage constituents, modernize systems, and streamline processes. We have worked with more than 25 states, including implementing Salesforce applications for 12 different states and 5 different transportation agencies. Across Slalom we have delivered 3,400+ projects for 150+ public sector clients. Our work spans all aspects of state and local government, including working with MassDOT to build solutions for Aeronautics, Correspondence Management, Governance, and Legal Case Management.

At Slalom, personal connection meets global scale which means for DOT, we bring the best of our local and global expertise. Our local Boston office includes nearly 400 consultants with expertise in Salesforce, training and change management, data and analytics, business transformation, process and experience design, and application development.

6,800+ Salesforce projects	10,000+ Salesforce certifications
4,000+ Salesforce consultants	4.9/5 Salesforce CSAT score

We love our clients, and our clients love us as evidenced by our 4.9/5 customer satisfaction rating across all our Salesforce implementations. In 2022, our public sector industry had the highest Customer Love score - a quantitative measure of how we are doing with our clients, scored across 10 metrics ranging from doing what is expected to helping clients transform. Our clients tell us that we are truly helping.

Slalom has been a Salesforce partner for over 15 years, serving public and private sector clients. We have proudly earned Salesforce Platinum Consulting Partner status - the top Salesforce partner status available. Even among the elite group of Platinum partners, Slalom holds special distinctions that demonstrate our depth and breadth of Salesforce experience:

- We are Salesforce's #1 Partner Globally for the first half of 2023.
- We are consistently a Top 5 partner for the Public Sector.
- We have achieved Salesforce Navigator Expert Status for Public Sector and 5 other capabilities. This means that Salesforce has recognized Slalom as a partner who can

handle the largest and most complex projects and that we have consistent delivery quality as measured by customer satisfaction scores from our own clients.

- We sit on Salesforce Partner Advisory Boards and provide input into the Salesforce product roadmaps.
- We are a Salesforce Military Alliance partner and a part of the Hiring our Heroes Salesforce Fellowship program.
- We are a 7-time Partner of the Year with Tableau with 1,800+ certified consultants.

Slalom is designed to deliver the full suite of services needed for successful technology implementation, including:

- **Business analysis** | They key to any successful technology implementation program starts with our ability to understand the business needs and long-term objectives. For Slalom, our Business Value Enablement capability is centered around our ability to elicit requirements through various channels, including collaborative workshops, stakeholder interviews, evaluation of current state process flows and identification of existing pain points. This collaborative research allows us to understand where there are opportunities for efficiencies, and ultimately draft the ideal future state process flows. With business requirements clearly defined, our team of business analysts can more easily bridge the gap between business stakeholders and technology teams to ensure the implemented solution is aligned with the business's goals and objectives.
- **Project management** | Slalom's largest capability is Delivery Leadership, a group dedicated to delivering technology programs that has supported thousands of programs overall and hundreds in the public sector. We run our own technology implementation programs and are trusted to run our clients' most strategic programs. We have developed several programs to support our continued pursuit of excellence, including our Salesforce Delivery Framework (i.e., how we consistently deliver Salesforce programs from proper discovery to design to implementation and change), our Delivery Center of Excellence (i.e., how we set up our programs with organizational and role clarity, clear communication and management of risks and decisions, and measured progress), and a Delivery Excellence Framework (i.e., how we select the right people to oversee and be accountable for the program and partner with our clients to succeed). ;.
- **Training and change management** | Technology initiatives are more than implementations. They are an opportunity to transform and enable new ways of operating. Our Organizational Effectiveness (OE) capability develops change strategies that feel personalized yet scale. We assess change readiness, impacts, and learning needs and then design and deliver persona/role-based learning journeys. We think through organizational issues, identify 'what's in it for me' for the user, and deliver training that drives successful adoption.

2.2 Slalom's Qualifications

Below are three stories that demonstrate Slalom's experience with Salesforce PSF and Transportation.



Massachusetts Department of Transportation Salesforce Public Sector Grants Management System

The solution includes: Legacy Transformation | Transportation |
Public-Facing Portal | Public Sector Foundation | ESRI ArcGIS |
eSignature | System Integrations | Training & Adoption | Agile
Methodology

Objective: Enable future growth of investments in municipal infrastructure by simplifying access to community grants

MassDOT's Community Grants Portal will provide municipalities access to vital grant funding programs used to make critical investments and improvements to transportation infrastructure and operations. By consolidating MassDOT's portfolio of community funding programs into the new Community Grants Portal, municipalities and MassDOT staff will be equipped with an organized, highly accessible centralized system where all grant management activities from across 6 community funding sources is easy-to-find, accurate, and efficiently managed and administered via a public-facing self-service municipal portal and robust grants management system.

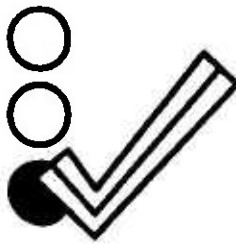
Solution: Salesforce PSF grants management solution

Slalom is currently partnering with MassDOT to implement this new application which will launch in Spring 2024. This work began with a comprehensive Discovery Phase to confirm the current/future processes of grant management for each individual grant program, using Slalom's Government Grants Framework as a starting point to inform who we engage, what we build, and how we organize the work. Slalom partnered with MassDOT to define a solution leveraging the Salesforce PSF that will enable MassDOT to extend their system easily as needs evolve while still maintaining a low cost of ownership. Currently, this work is in the Build Phase with the Slalom and MassDOT teams partnering on an Agile sprint-based delivery to deliver the solution with key features including an ESRI ArcGIS map integration, SharePoint file management via sFiles, and eSignature technology.

Impact: From legacy systems to a consolidated comprehensive portal

Once the new portal is launched, some legacy systems will be sunset and the MassDOT staff will spend less time on manual and inefficient tasks, such as piecing together reports across source systems. Salesforce reports and dashboards will enable the team to quickly gain key business insights and proactively plan. MassDOT will have one place and process to manage all funding programs.

The new Community Grants Portal will provide a simple and clear interface for Municipalities to understand the funding options available and qualifications to apply to the best fit program. Municipalities will also have a simpler, more streamlined experience applying for grant funding, contracting with the State, and submitting expense reimbursements. By simplifying this process, MassDOT expects to increase engagement in these vital grant funding programs that support transportation infrastructure across Massachusetts.



Massachusetts POSTC Certifications and Standards Salesforce Public Sector Foundations Case Management System

The solution includes: Certifications and Case Management | Public-Facing Portal | Public Sector Foundation | OmniStudio Document Generation | Training & Adoption | Agile Methodology

Objective: Reduce time consuming manual work and improve automation

The Massachusetts POSTC was formed in 2021 as part of sweeping criminal justice reform legislation enacted in response to recent, high-profile police brutality incidents and ensuing protests of the prior year. Statutory deadlines looming, POSTC quickly needed to establish a technology infrastructure that would allow it to meet regulatory responsibilities and provide a permanent, secure platform for supporting its mission across 2 separate divisions: Division of Standards and Division of Certification. POSTC faced many challenges as it related to how complaints and certifications were processed including:

- Individual complaints were sent to the POSTC Standards team via email.
- All complaints/allegations/cases were tracked manually.
- There was no standard process for intake, triage, or tracking complaints.
- Information was stored in multiple locations.
- There was no centralized repository for easy reporting.
- Team members could not share workloads.
- Law enforcement agencies would send POSTC spreadsheets with all officer recertification data via email.
- POSTC created individual Jira tickets to track officers' recertification applications.

Solution: Salesforce PSF case management system

From the start, Slalom aligned with POSTC to leverage PSF as the backbone for the solution. A strong emphasis on configuration over customization allowed our project team to deep dive with the client on co-creating business workflows that optimally met legislative requirements and out of the box PSF functionality. Our solution architecture made use of new Salesforce packaging and permissioning features to future-proof the POSTC solution. We used OmniStudio Document Generation to help POSTC generate Certifications. We adapted legacy workflows in Jira and email to fit within Salesforce PSF capabilities without custom coding. We handed over an easy-to-maintain metadata codebase and a streamlined DevOps process that enables POSTC to deploy changes continuously and rapidly to production with confidence. Our organizational effectiveness practice ensured a smooth transition, training, and adoption for POSTC users.

The solution created:

- An LEA portal for users to log in for all required complaint and certification actions. A public portal for users to access the certification status of officers on demand.
- Individual officer contact records that maintain all standards and certification information for the officer throughout their entire career.
- Automation around officer recertification applications, enabling POSTC to cut down the manual steps of initial triage.
- Automated documentation generation and distribution capabilities.

- Streamlined reporting capabilities for POSTC/public consumption regarding officer/agency recertification and standards information.

Impact: Improved efficiency and high adoption

Since implementation, POSTC has been able to:

- Gain efficiency in managing workflows.
- Sunset the Jira interim solution, resulting in immediate cost savings.
- Enhance business workflows in a way that is uniquely supported by Salesforce.
- Establish a system of record for approximately 26,000 officers across the Commonwealth.
- Save admin time for law enforcement agencies who can track their officers' status and pending actions without email back-and-forth.



**City of Boston Planning and Development
Agency (BPDA) Salesforce Developer Portal
Solution**

The solution includes: Developer Project Management |
Public-Facing Portal | ArcGIS Maps | Data Migration | System
Integrations | Training & Adoption | Agile Methodology

Objective: Improve urban planning by creating an efficient and consistent developer portal

The BPDA is on a multi-year journey to modernize and improve urban planning and economic development across Boston. Outdated tools and services critically need to be replaced to create efficiencies to achieve new levels of transparency, accessibility, and service delivery for City Hall, Boston-area developers, and residents.

BPDA's existing developer portal is the primary tool for management of key review processes for all city development projects. It is inefficient and inconsistent in both form and function, delivering inadequate experiences for developers, project managers, and BPDA employees. Stepping in to support BPDA, Slalom identified several technical and business opportunities to improve the portal; most significantly replacing legacy functionality with new Salesforce features aligned to BPDA's urban planning and development processes.

Solution: Slalom's Salesforce developer portal

Slalom partnered with BPDA to establish a cross-functional delivery team to update BPDA's developer portal. Coaching BPDA in the latest agile principles, Slalom and BPDA rapidly developed, demonstrated, and iterated to a new portal minimum viable product (MVP) by leveraging a backlog of requirements identified during an upfront Discovery Phase. Building to this Portal MVP, Slalom and BPDA delivered a state-of-the-art, developer-focused portal to BPDA's developer customers.

Designed from the ground up, the new portal enhances developers' and project managers' experience with improved self-service capabilities, integrations to Box for file storage and ArcGIS for mapping capabilities, and features that ensure BPDA's data is up-to-date, accurate, and protected.

Impact: Improved efficiency and high adoption

Empowering BPDA with our Salesforce, delivery, and business advisory expertise (delivery leadership, Salesforce solutions, QA, change management), Slalom successfully delivered a re-imagined Salesforce developer portal to BPDA that:

- Enhanced the user experience for 160 active users.
- Provided immediate and on-demand access to over 130 migrated active projects – with no disruption to in-flight development reviews.
- Was supported by comprehensive train-the-trainer services, a groomed product backlog of additional ideas, and technical support enablement / documentation.
- Improved visibility, accuracy, and accessibility to BPDA's urban planning and economic development data for Mayor of Boston, City Hall, and Boston residents.

3 Key Staff and Subject Matter Expertise

Table 1 reflects the experience of representative resources we have available to staff the DOT ePermitting engagement. The table includes the names of the resources and a summary of experience and skills. The 'Key Staff Required' tab in the 'Vendor Information Workbook - DOT 387-24' includes these staff and a summary of each person's experience. Please see the Appendix for representative team member resumes.

Table 1 - Representative Staff and Relevant Experience

NAME	ROLE	RELEVANT EXPERIENCE
Technical Resources		
Mike Snively	Solution Architect	With over 13 years of experience, Mike has led and delivered several impactful Salesforce CRM initiatives for the public sector. Most recently, he was responsible for defining, designing, and implementing an enterprise CMS for POSTC. The solution, built on Salesforce PSF , drove transparency with the law enforcement community and the broader public. Mike worked closely with key Commission personnel and law enforcement to translate legal regulations into procedures and best practices. Mike holds 6 Salesforce certifications, including the PSF Accreditation .
Nick Vogler	Lead Salesforce Developer	Nick has over 5 years of experience with Salesforce configuration in Public Sector agencies which allow him navigate Commonwealth regulations and deliver meaningful solutions. Specializing in Salesforce build, data visualization, and business analysis, Nick has assisted and led Salesforce implementations to support key business objectives and drive user engagement.
Darby Drake	Salesforce Developer	Darby has had extensive experience within the public sector, dating back to her undergraduate degree in public policy, planning, and development, which has been applied to her Salesforce implementation experience with PSF . She is knowledgeable with Copado , being able to deploy and troubleshoot independently, and support others. She is also a Salesforce DocuSign eSignature SME, with the ability to oversee the entire lifecycle and implement envelope configurations.
Jack Gorman	Salesforce Developer	Contributed to the design and implementation of a constituent-facing Salesforce Experience Cloud site and the underlying infrastructure to centralize and streamline the application process for municipal grant procurement. Configured integrations and installed packages for efficiency in e-signature and document sharing. Provided demonstrations of configured functionality and implemented changes based on stakeholder feedback. Provided expertise in security and access, automation, and declarative configuration with the PSF package.

NAME	ROLE	RELEVANT EXPERIENCE
Sounder Rajan Sridharan	Integration Developer	Sounder is an Integration Architect and Senior Developer with 18 years of IT Consulting experience. He has led several IT Modernization programs with contributions in areas of Integrations and Enterprise Architecture, Security Design, API Management and Cloud technologies. Specifically, Sounder has experience in extracting from and writing data into Oracle/Access/SQL databases and Salesforce.
Greg Vavoules	Data Visualization Specialist	Greg has 9+ years of experience working with data, creating engaging visualizations using tools like Tableau and setting up the infrastructure to get insights quickly and accurately. He creates compelling stories through visualizations that can be used to influence and enable smarter strategic decisions.
Program Management Resources		
Nate Higgins	Client Partner	Nate is an innovator and transportation problem-solving expert who focuses on constant improvement. He has 17+ years of experience delivering solutions that blend technology, data, analytics, and strategy, mostly in the transportation space. For DOT (for his prior firm), he was the contract manager for two New Hampshire statewide asset management contracts that delivered a vision for bridge management software, user-focused requirements for the work order and inventory management system, an updated construction price index, the statewide asset management plan, etc.
Trish O'Neill	Project Manager / Scrum Master	PMP Certified, Trish brings 8 years of experience in leading technology implementation and assessment programs. Her public sector experience includes serving as the engagement lead / Scrum Master for Slalom's recent Salesforce program at MA POSTC , leading the implementation of a Salesforce Community Portal used to track certifications and standards for police officers across the Commonwealth. Prior to that, she has served as Engagement Lead, Solution Owner, and/or Scrum Master for Slalom's large Salesforce programs across a variety of industries. She is a seasoned consultant in managing complex software delivery, and brings expertise in Business Analysis and Quality Assurance to help drive success for her clients.
Jaymi Cohen	Process Architect	Jaymi is an experienced senior consultant with a passion for solving complex problems and helping people live their best lives. She has experience in a variety of industries most notably in local and state government and education as well as disability and education policy and strategy. She is currently serving as the Lead Process Architect for Slalom's MassDOT Grants program , and previously served as Senior Business Analyst for Slalom's Boston Planning & Development Agency program. She began her career managing all programs and services for the City of Boston Commission for Persons with Disabilities in English and Spanish and has spent the last 6 years consulting and specializing in strategy, process optimization, business analysis, and project management, with additional experience in training development and facilitation.
Andy Meigs	Quality Lead	Andy has led all aspects of Quality Assurance for large, complex initiatives across multiple workstreams from in-sprint functional testing through integration's testing, data migration, and user acceptance testing. He is experienced at spinning up QA teams from scratch, and coaching agile teams to build quality into each step of the process. Andy is Scrum Master.

NAME	ROLE	RELEVANT EXPERIENCE
Cormac Malley	Business Analyst / Quality Analyst	(PSM) Certified and brings a strong Business Analyst mindset to his engagements.
		As a Certified Salesforce Administrator , Cormac brings technical expertise to the Business Analyst / Quality Assurance Analyst role. Cormac served as the BA/QA Lead for Slalom's recent Salesforce program at MA POSTC . He is skilled at requirement elicitation and gaining a deep understanding of the business needs. Cormac is a team-oriented, collaborative individual, working closely with both technical and functional resources to ensure development meets the needs of the business.

Training Resources

Andrew Bunyard	Training Lead	Andrew brings to his work 9+ years of experience leading change and training efforts for technology adoption initiatives. His public sector experience includes 6 projects across multiple states, including work on Integrated Eligibility Systems (IES) in Rhode Island, Massachusetts, and Michigan, as well as a data analytics platform implementation for the State of New Hampshire Department of Health and Human Services . In addition to public sector experience, Andrew served as Change and Training Lead on a multi-national Salesforce-based CRM and customer portal implementation for a global medical device company.
Kathleen Hughes	Training Consultant	Kathleen has extensive background in learning strategy, development, delivery and change management, including 5+ years of public sector experience delivering change management for a core system implementation at the Massachusetts Registry of Motor Vehicles . She is a Certified Professional for Learning and Performance (CPLP).

Technical Subject Matter Expertise

Allen Mann	Digital Service / Chatbot SME	Allen is a Digital Service Technical Architect with over 8 years of experience designing and building innovative solutions on the Salesforce platform. He functioned as a Technical Architect for a development team that delivered an Einstein Bot implementation that support 4 brands with one bot, lookup order status from an external system, recognize website authentication state, and understand customer inquiries via natural language processing.
Ryan Dowski	Public Sector Solutions SME	With over 12 years of Salesforce experience, 6 years of consulting experience, and 3 certifications, Ryan specializes in the Government and Public Service sector helping client implement and enhance their Salesforce instances. Ryan oversaw and led multiple projects and workstreams with State clients focused on PSF , custom Service Cloud and Experience Cloud implementations. Ryan has extensive knowledge of public sector, Salesforce best practices and Agile.
Yiling Zhang	ESRI/Copado SME	Yiling has served as the Technical Delivery Oversight SME on many Salesforce engagements, and provided thought leadership on topics like system integrations, ESRI ArcGIS map rendering, Salesforce solution design, complex workflow process automation, DevOps/Copado, PSF data model design, cutover planning . She has played an advisory/architect role on 3 public sector projects and has 8 years of Salesforce delivery experience in development, architecture, and delivery leadership roles.

NAME	ROLE	RELEVANT EXPERIENCE
Julien Ouellet	ESR/Doc Gen SME	Julien has consulted on many of the MassDOT engagements and built complex functionality like the ESRI ArcGIS map integration and letter template generation for correspondence. CERIFICATIONS: Salesforce Certified Application Architect, System Architect, Platform Developer, Sales Cloud Consultant, Service Cloud Consultant, MuleSoft Certified Developer.
John Hecker	Payment SME	John is an Architect and Technical leader with over 12 years of Salesforce and cloud technology experience. He has led delivery teams primarily focused on Salesforce for the last six years. John has experience in integrations with multiple payment gateways , process design and architecture, full ledger development, and architected a processing system on Salesforce with direct bank integration.
Kristen Erickson	UI/UX Designer	Kristen is a UI/UX designer that applies a human-centered approach to digital experiences, which enables her to consistently strike the right balance between company and customer needs through design. She has 10+ years' experience solving complex problems through simple, intuitive designs. She brings strong user empathy, deep analytical skills and creativity to identify the problem and develop the right solution.

4 Technical Solution

Building a scalable, intuitive Salesforce MVP PSF solution is not only important to DOT's operational efficiency, but also critical in supporting the DoIT's and SoNH's forward-looking vision to have a New Hampshire Permitting Portal for constituents across multiple State agencies.

We architected the solution based on the following guiding principles:

Make use of the standard PSF data model and pre-built apps where possible. One goal of the solution is to leverage the existing Driveway and ROW activities MVP implementation as a starting point to then scale to other permit types across multiple agencies within the SoNH.

Embrace a declarative-first approach that allows for ease of maintenance and enhancement. Leveraging out-of-the-box Salesforce declarative tools, we will deliver a simple, clean experience for each permit type. We will only consider custom code if truly necessary, and clearly lay out the solution design and maintenance implications for alignment and DOT and DoIT approval.

Realize immediate value from the portal with a well-defined MVP scope, and iteratively enhance it. We are ready to help DOT experience speed, efficiency, and agility with this implementation. We will partner with DOT to prioritize the backlog to determine functionality that will yield the most meaningful and impactful value to constituents and DOT staff.

Consolidate shared foundational requirements across agencies, streamline operations, and avoid "Department of" fatigue. DOT has identified foundational requirements that will be needed by other agencies. Examples include online payments, ArcGIS maps, portal single sign-on (SSO), and eSignature. We will help DOT and DoIT imagine and build the solution once so that it can be easily applied to other use cases with minimal (or without any) changes.

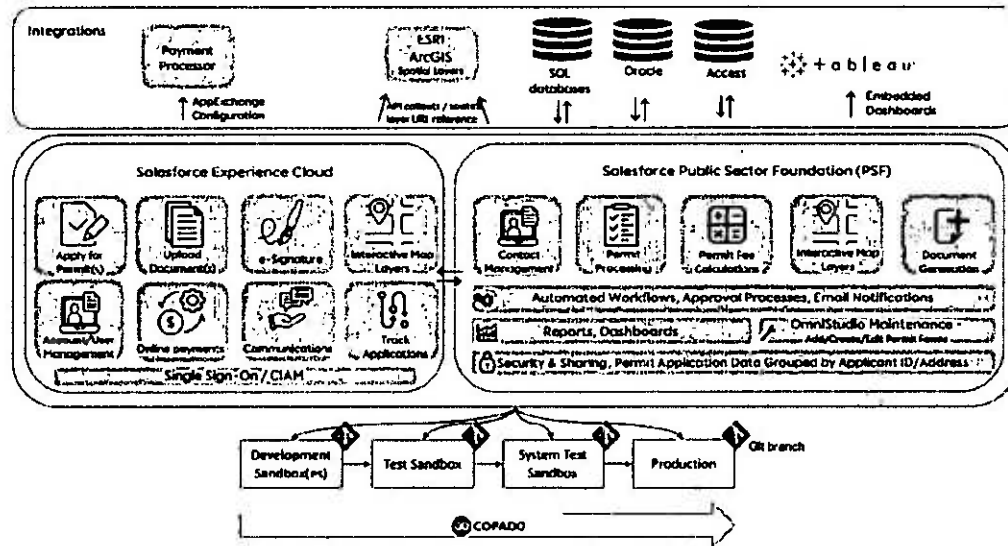
Leverage the standard in-platform bidirectional communication mechanisms. These tools will enable the support team to provide timely support via the constituents preferred communication channel, all in the specific context of a permit application.

Look ahead to security and sharing requirements across agencies. While it is helpful for different agencies to access permit application data grouped by applicant or address, we anticipate agency-specific, sensitive data needs that may require secure storage. For example, DES may be allowed to view DOT's permit applications, but they may not be allowed to edit or delete the DOT permit data, and vice versa. It is important to have alignment on these high-level security/sharing requirements and how they fit into the MVP solution.

Figure 1 illustrates our proposed future state technical architecture. Leveraging Salesforce PSF as the foundation for the solution, we will use declarative features to extend the permit application experience into Salesforce Experience Cloud for the State constituents and we will build integrations with the payment processor, ESRI ArcGIS, Oracle/Access/other SQL databases, and Tableau. We will partner with DoIT and DOT to refine the solution architecture based on detailed business requirements. Copado will be

used to commit, promote, and deploy metadata changes between Salesforce environments.

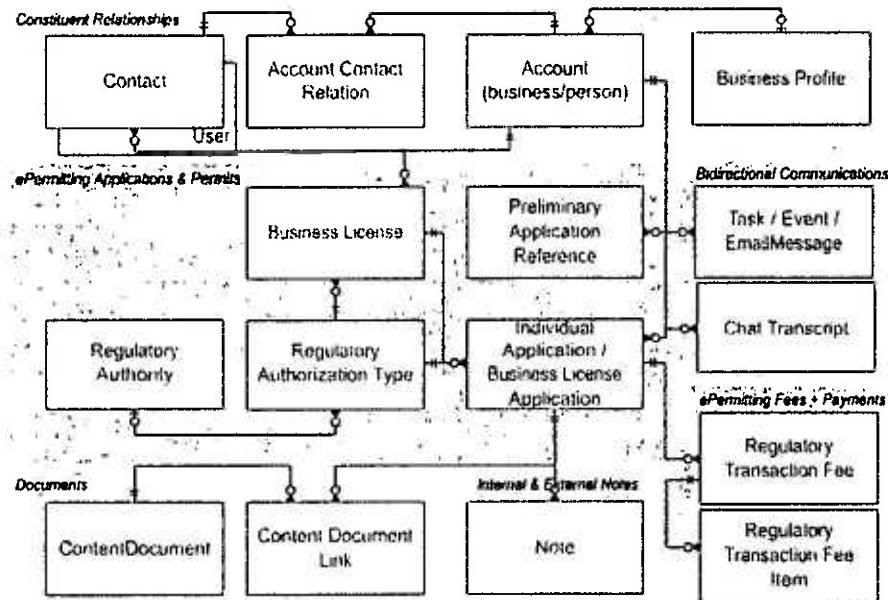
Figure 1 - Illustrative Technical Architecture Diagram



Below are key elements of the technical architecture:

- The PSF data model and capabilities will be used to deliver a best-in-class, scalable ePermitting solution.
 - Standard Account and Contact data models will be used to easily manage constituent relationships - including individual and commercial SoNH property owners and their consultant representatives. It will elegantly enable scenarios where a permit consultant is simultaneously helping multiple property owners through the ePermitting process.
 - Standard PSF Objects like PreliminaryApplicationReference, IndividualApplication, BusinessLicenseApplication, and BusinessLicense will enable DOT to effectively process, record, issue, or reject permits.
 - Permit fees and payments will be tracked via RegulatoryTrxnFee and RegulatoryTrxnFeeItem objects, conforming to the PSF product design.
 - Constituents will be able to upload documents as Files (ContentDocument). DOT staff will easily access the list of Files in the context of permit applications to review, search, retrieve, and track versions of the permit.
 - The data model in Figure 2 below highlights how the Salesforce Standard Objects will be used. As we partner with DOT to define the detailed business requirements, we will refine the data model as necessary.

Figure 2 - Our Proposed Data Model (Using Standard Objects)



- The core functionality of DOT ePermitting will leverage many out-of-the-box declarative features provided by the Salesforce platform and PSF, including but not limited to:
 - OmniStudio for document generation based on predetermined, easily configurable templates.
 - OmniScript and Flows for extensive capabilities that automate workflows, display screens, send notifications, calculate permit fees, and log and track automated outbound communications.
 - Community templates on Salesforce Experience Cloud that extend the core platform beyond DOT staff to public constituents, who will be able to register for portal access, apply for permits, track application progress, and have bidirectional communications with DOT staff.
 - Single sign-on (SSO) functionalities configured for Experience Cloud portal registration and login experience, enabling constituents to manage one set of usernames and passwords across multiple platforms within the SoNH.
 - Salesforce Documents to easily expose an online digital document library to the constituents in Experience Cloud.
 - Standard Salesforce functionalities such as Tasks, Events, Emails, Chatter, as well as more advanced digital engagement channels (e.g., text or Chatbot) to communicate with applicants.
 - Approval Processes that enable DOT staff to efficiently approve or reject incoming permit applications in a streamlined fashion.
 - Salesforce Reports and Dashboards to help DOT employees easily slice and dice data by user persona, permit application type, fiscal year, agency time, and more.
- We will extend the baseline PSF solution with additional functionalities as needed by DOT by integrating with and connecting to other 3rd party applications.

- ArcGIS interactive map layers will be rendered and delivered via custom and lightweight lightning web components (lwc), leveraging relevant JavaScript libraries (e.g., Leaflet), and incorporating spatial data that is available to SoNH.
- The Salesforce solution will be integrated with existing databases - Oracle, Access, SQL, and other external databases - via direct API calls or via a middleware solution.
- eSignature solutions by permit type will be solutioned and configured, enabling DOT to collect and store the appropriate type of eSignatures in either fields or files in Salesforce as part of the constituent ePermitting application experience.
- We will build integrations between Salesforce and SoNH's preferred payment processor that enable constituents to easily pay for their permit applications while ensuring private payment information does not get stored anywhere outside of the payment processor system.
- Tableau will be used when data stored outside of Salesforce and data stored inside Salesforce need to be combined to create required reports.

5 Program Management

Slalom builds structures and ways of working that cultivate and accentuate our partnership and ensure optimal program setup. At the start of the project, we will work to integrate with any governance functions the DOT and SoNH currently have in place. This will enable us to get up to speed on what has already been completed, deliver on requirements, manage scope, and resolve issues within the timeline and budget of the program.

Quality is never an afterthought, but rather an integral part of how Slalom runs programs. We believe in promoting whole team ownership of quality across all project components and processes throughout the project lifecycle. Slalom has an established, professional delivery quality program called **Delivery Excellence**, which ensures our teams work in a consistent, cohesive way throughout the delivery lifecycle of an engagement. Delivery Excellence is guided by three core tenets which we call "The Big 3":



Organization (Org) & Role Clarity

Slalom will work with DOT and DoIT to clearly define roles and responsibilities between Slalom and the SoNH stakeholders and resources. In addition to roles and responsibilities, we will clearly define escalation paths and communicate with all team members. Properly defined org and role clarity leads to an increase in speed to decisions and reduces the need for rework.

Program Machine

Slalom will work with DOT and DoIT to ensure all resources understand how, when, and where to document and manage issues, risks, decisions, scope, and progress. Having a defined 'program machine' with fact-based documentation creates transparency to appropriate information, manages expectations even when changes occur, and empowers all individuals to share perspectives. It also reduces confusion, disruption to progress, and the need for rework.

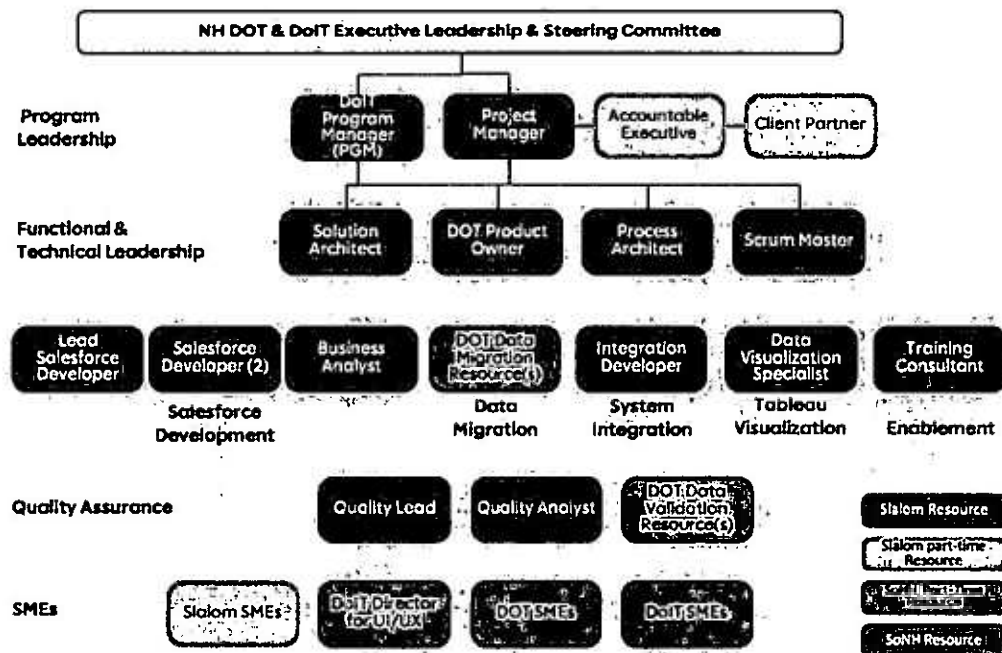
Measured Progress

Slalom values transparent measurement of progress against plan for on-time completion. Measured progress enables Slalom and DOT to make decisions based on facts and data, provide transparency on the root cause of issues and risks, react early to deltas in the plan, and manage expectations efficiently.

5.1 Organization and Role Clarity

Slalom's proposed team will be a cohesive, cross-functional group of experienced Slalom, DOT and DoIT resources, both full-time and part-time. Figure 3 shows the organization structure. The team includes Executive Leadership and a steering committee (SteerCo); program, functional, and technical leadership; skilled resources for Salesforce development, business analysis, integrations, data migration, data visualization and training; and specific SMEs as needed.

Figure 3 - Organizational Structure



At the onset of the project, it is important to establish role clarity and transparency, with clear paths of accountability and escalation.

To do this, we will:

- Document roles, responsibilities, and organizational structure including a SteerCo to oversee the project and provide input from DOT and DoIT.
- Empower senior program leadership and accountable leaders to support the project manager.
- Align on escalation paths across workstreams and ensure defined escalation paths are clearly understood by all project team resources and stakeholders.
- Enforce accountability across the program by setting clear expectations and providing regular feedback to all team members throughout the engagement.

5.2 Program Machine

Ensuring the right information is delivered to the right stakeholders at the right time to effectively manage issues, risks, decisions, and scope changes is a critical component to program success. Having a program machine in-place provides the appropriate guardrails to make sure resources feel empowered, decisions stick, and stakeholders are informed, minimizing disruptions to the program. Having clearly defined program governance, scope management processes, quality management processes, and risk and issue management strategies in place is a key component of implementing the program machine.

Program Governance

We believe strongly in structures and ways of working that cultivate and accentuate our partnership and ensure optimal program setup. At the start of the project, we will work with the DOT and DoIT team to integrate with any governance functions currently in place to enable the delivery of a scalable, long-term solution that will be adjusted over the course of the project as needed.

Key components of Slalom's program governance include:

- A project kick-off meeting with leadership and key stakeholders to review and align program objectives, guiding principles, team organization and communication processes so the team can start strong and work through critical decisions early.
- Alignment conversations with leadership and stakeholders to enable the team to start well and work through critical decisions early with clear and prioritized project objectives, outcomes, and guiding principles.
- Leadership and a SteerCo to clarify project priorities, promote alignment, resolve escalated risks, and make decisions.
- An in-person ways-of-working workshop to start our partnership where we will discuss preferred forms of communication, meeting cadence, communication styles, etc.
- A strategy centered around clear and prioritized outcomes and guiding principles for the project and a clear process to continuously measure and report on project status.
- A decision-making model to ensure stakeholders are aligned and informed on decisions made.
- Decision-making criteria to ensure we are making technical decisions that are scalable long-term.
- An effective project management methodology and plan.
- A clear deliverable review process.
- An efficient and effective quality management process that aligns with DOT's and DoIT's current processes.

Deliverables | Program kick-off, discovery workshop final read-out, project schedule, program governance model

Scope Management

Once initial business process design and requirements definition are complete, we will partner with the DOT and DoIT to reflect on vision and outcomes, and subsequently prioritize features and capabilities of the solution to maximize user value. For each of the major capabilities we will review the business value, complexity, and effort and prioritize

and sequence capabilities for implementation. This capability roadmap, combined with the future state architecture, timeline and budget drivers, tool recommendations, and considerations (i.e., across eSignature, payment processing, text messaging, and Chatbot) will shape our implementation strategy.

Proactively managing scope is critical to success and we will use a clearly defined change control process to manage program outcomes. While we will integrate with any existing scope management practices and processes DOT and DoIT have in place, Slalom closely follows the core tenants of change control to maintain alignment of scope and priorities throughout the duration of the program. This approach includes a documented process to work with the SteerCo and program leadership to intake requests, review items for consideration, decide on tradeoffs or alternative paths forward to service the DOT priorities, document decisions, and communicate change requests. This structured process will help DOT and DoIT make informed decisions and achieve desired outcomes.

Quality Management

To ensure Slalom, DOT and DoIT are in lockstep and continuing to evolve the efficiency and effectiveness of the program, we will ask for feedback. At the end of each sprint and project phase, Slalom will conduct retrospectives. Slalom creates a safe, constructive environment for candid feedback about what went well and what could be improved. This type of rapid, direct feedback is part of our culture and directly contributes to strong project delivery. In addition, we will conduct pulse checks throughout the project to ensure smooth delivery on established program outcomes and measures of success.

Show not tell.

We will share deliverables in an iterative fashion.

For planning and design deliverables, we will provide outlines and drafts to ensure alignment before they are submitted for approval.

For software-related deliverables, we will use prototypes, sprint demos, and user acceptance testing (UAT) to showcase the configured solution and solicit feedback.

Risk & Issue Management

A program of this size and duration will naturally encounter risks and issues. We use a collaborative approach to identify, process, and document all risks, issues, scope requests and key decisions. We document the risks in a log that includes the owner, impacts, due date, and key decisions. The log is a critical project management tool reviewed in SteerCo meetings and other forums to promote transparency and facilitate issue resolution. The log also serves as a historical record for reference. Table 2 identifies initial key risks for this program and our recommended mitigation strategies. We will work with DOT and DoIT at the kickoff to refine this list and align on the optimal resolution approach.

Table 2 - Initial ePermitting Program Risks

POTENTIAL RISK	MITIGATION STRATEGY
Lack of long-term buy-in, adoption, and engagement	Align on key measures of success and desired objectives early, support users in adopting new ways of working through an enablement approach and develop a customized training approach to upskill users inclusive of instructor-led sessions and quick reference guides.

Delayed decision making	Engage SteerCo in a clearly defined process to manage issues and obtain required decisions in a timely manner that includes identification of risk or issue, decision owner, when a decision needs to be made by, impact on time, scope, budget, etc.
Parallel development and Salesforce solution interdependencies	Align on an org-level governance structure and stay in close touch with other parallel developments that are taking place in the same Salesforce instance (e.g., DES), and have a clearly defined decision-making process to address any competing requirements and functionality interdependencies.
Lack of process standardization leading to over-customization	Design business processes to align with configurable workflows in Salesforce, identify and engage SoNH decision makers to champion process standardization, and leverage change control board to review customization requests.
Growth of project scope	Stand up a governance escalation process with clearly defined decision-making criteria to evaluate a request's impact against confirmed scope (i.e., value vs impact to time, scope, budget, etc.) and a clear time to resolution. Maintain RAID log to document risks/issues and provide traceability to decisions, decision maker, and their justification.

Deliverables | RAID (risks, actions, issues, and decisions) log.

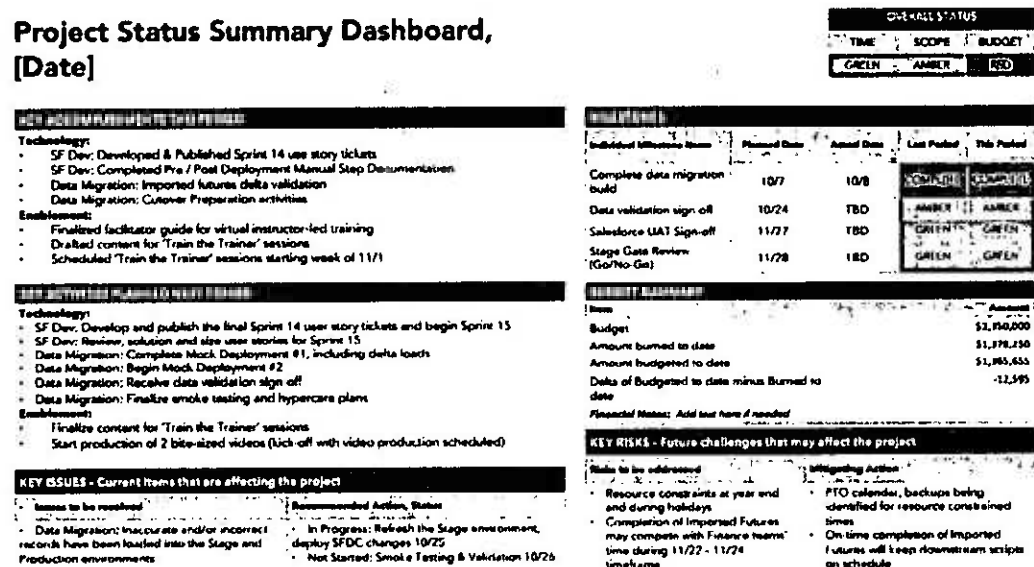
5.3 Measured Progress

We recognize the importance of continuously measuring progress and quality performance. While collaborating on the approach and integrating with any quality monitoring functions the DOT and DoIT currently have in place, we will use either a widgetized project plan or burnup chart/deliverable tracker.

Consistent status reporting is critical to the success of any program. Slalom, DOT, and DoIT teams will participate in regular status meetings to review the health of the project, review work products, prioritize activities, and address any needs or requirements to keep the project on track. Figure 4 shows a sample status report to guide these recurring check-ins.

Figure 4 - Example Project Status Report

Project Status Summary Dashboard, [Date]

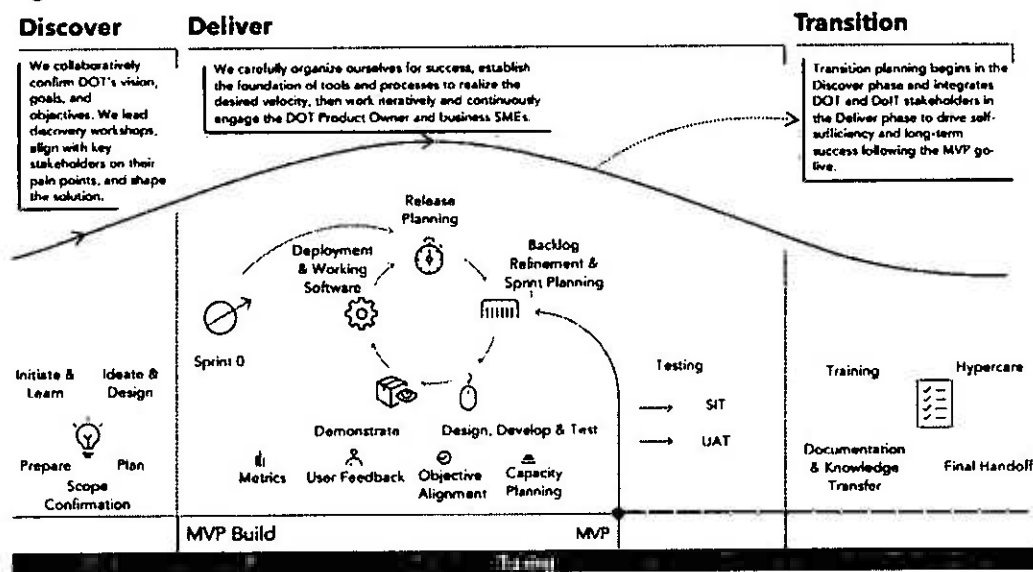


Deliverables | Bi-weekly project status reports.

6 Delivery Approach

Predictable, quality delivery is critical to our business and to our clients. Slalom has an established Salesforce delivery approach that facilitates more collaborative and consistent delivery results with our clients. This approach is based on leading practice guidance on all aspects of the Salesforce implementation lifecycle with an overarching focus on rigorous governance to de-risk delivery. It includes phases, activities, deliverables, templates, and clear exit criteria to move through the phases of the implementation lifecycle. Figure 5 visualizes our delivery approach.

Figure 5 - Our Salesforce Delivery Approach



We approach each phase of the program as follows:

Discover | We will work with DOT to define an MVP scope to address the people, process, data, and technology changes required to achieve business outcomes. We will focus on user needs, required data, workflows and processes, and the underlying technology that enables core business objectives. We will capture requirements, ensure foundational solution and integration designs are completed, and prepare the backlog and technical environments for build.

Deliver | We will focus on speed and quality, incorporating the best practices of Agile. Our momentum comes from a transparent, responsive focus on your priorities, leading to a fast and flexible implementation. We will deliver the solution in 2-week iterative development sprints with demonstrations of meaningful functionality to the business. We will also execute sprints dedicated to testing and planning for go-live.

Transition | Our standard practice is to deliver with you not to you by creating a blended team of Slalom, DOT, and DoIT resources to collaboratively deliver together, ultimately easing the transition at the end of the engagement. During Transition, we will work alongside DOT and DoIT to ensure a smooth Go-Live. After Go-Live, we will resolve

prioritized defects and make any necessary updates to technical and functional documentation to reflect the delivered functionality. We will hold knowledge transfer sessions for DOT and DoIT resources to make certain the teams have a complete understanding of processes and technology and are confident in their ability to maintain the solution independently.

Slalom will execute seven major components of work throughout the delivery life cycle, including 1) process design and business requirement definition, 2) technical design, 3) build, 4) test, 5) train, 6) deploy, and 7) hypercare and transition.

6.1 Process Design and Business Requirement Definition

Our goal is to deeply understand the DOT, its mission, goals, processes, ways of working, and its user and stakeholder touchpoints before designing a solution. We look to understand the way your teams work, the vision users have for a new experience, learning from you because nobody knows the DOT as deeply as you. We will use our strengths in process design and technical delivery to translate what we learn into experiences that unlock efficiencies and put end-users at the center of the experience.

The first step in this approach is a current state analysis of existing systems, processes, data, and user needs. Effective analysis enables the capture of thorough and clear requirements, well-informed discussions about scope management, continuous user input, improved buy-in and adoption, and robust communication and collaboration amongst stakeholders.

To deliver a thorough analysis, we will:

- Identify personas for each user type so all can align on their capability needs (e.g., DOT employees, DoIT employees, commercial and individual property owners, and consultants).
- Review existing business processes (e.g., pole license permit application process, payment calculation and processing) and documentation.
- Review existing MVP Driveway and right of way (ROW) Activities permit solution, processes, data, and user needs.
- Lead interviews and discussions with the DOT's business subject matter experts.
- Develop Level 1 and Level 2 future process flows for prioritized processes that show the "what" of a process at its highest level and identify integration points with other systems, paying attention to the identified time-consuming steps and pain points.
- Align the future state business processes with out-of-the-box system functionality to minimize technical debt, minimize risk, and make the solution easier to maintain into the future.
- Define high-level MVP epics and features, initial backlog of user stories (to be refined throughout delivery), and build-ready sprint 1 user stories for the backlog.

Requirements gathering is expected to begin in the Discover Phase and continue throughout subsequent phases, allowing us to get to a more refined level of detail as the project progresses.

Deliverables | Future state process maps, high-level definition of MVP epics and features, requirement traceability matrix, initial backlog of user stories (to be refined throughout delivery), including build-ready sprint 1 backlog.

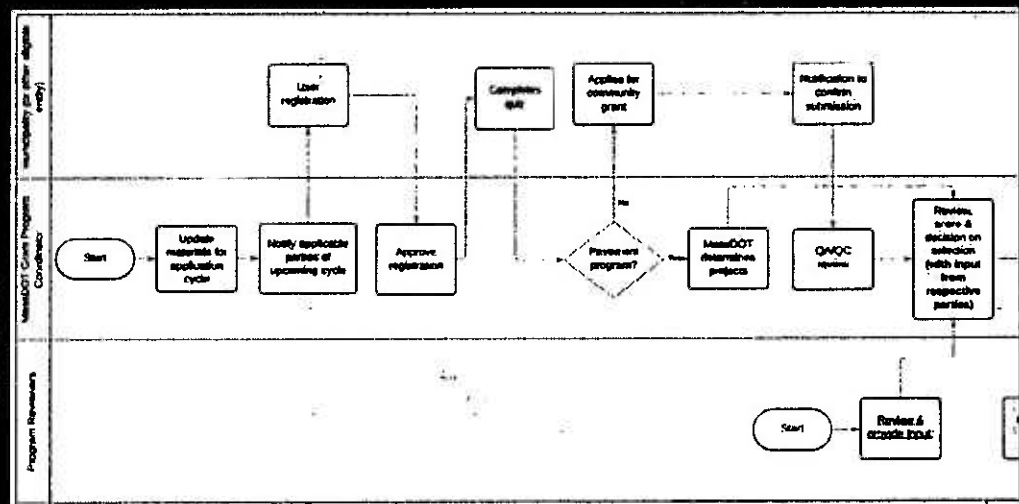
6.2 Technical Design

We will define the technical solution in parallel with the future state business process discussions to align to out of the box functionality. We will review many inputs - user personas, key requirements, pain points, existing Salesforce capabilities, integrations landscape - and host technical conversations with DOT and DoIT about the existing tools and capabilities. We will then translate these inputs into a high-level Salesforce and integration architecture solution design, which will inform the foundational data model, the high-level declarative tool preferences, any custom build needs, and any additional package or vendor needs for the MVP. We will align with DoIT on the development/operations (DevOps) plan and environment strategy, getting our development team ready for build kickoff.

Business Process Analysis and Design in Action - A MassDOT Experience

When we worked with MassDOT to implement its Community Grants Portal in PSF, we started the engagement by working with staff to redesign and standardize manual business processes for different grant programs into well-defined workflow that we knew could be built in Salesforce using clicks not code. We developed both Level 1 and Level 2 future state workflows to reflect the full grants management process from application through award, expense reimbursement, and closeout. Figure 6 shows an example of a Level 2 workflow. We also documented processes for activities conducted by the consultant contracts group, capital budget, contracts & records, and district state aid engineers who manage the contracting and expense reimbursement processes.

Figure 6 - Representative Workflow from the MassDOT Community Grants Portal PSF Discovery Phase



To get the project team ready for Build, we will:

- **Design the future-state solution, integration, and data architecture.** We will first review the current Salesforce architecture and systems inventory. Throughout Discover conversations, we will supplement our business process design sessions with specific functional questions that are in fact technology driven. Our understanding of the functionalities, coupled with technical discovery sessions with DOT and DoIT, will inform the foundational technical architecture solution design. Technical design sessions will be hosted for us to collect feedback, validate, and refine the business and technical approach, and gain full alignment with DOT and DoIT.
- **Finalize system integrations solution design.** We will evaluate each integration need, understand the "why", and consider the data that needs to be packaged, transformed, and transmitted. We will ask detailed exploratory questions to fully understand our options (e.g., Does it have to be a near-real time synchronization vs. a nightly batch? Does the data have to persist in target systems, or could we embed a view of the data within an "iFrame" type feature, so users can see data in one system, instead of two?) We will combine our extensive experience with enterprise integration tools with an understanding of SoNH's existing integration tools to create an integration solution design for each use case.
- **Co-develop the project environment strategy with DoIT.** We will ensure there is at least one integrated test environment for in-sprint testing, and that there is at least one other integrated system test environment for system integration testing (SIT) and user acceptance testing (UAT). We will also align with DoIT on DevOps roles and responsibilities and co-define the Copado branching and user story bundling strategy.

Deliverables | Salesforce and integration architecture diagrams, data model and security model design, DevOps plan, environment strategy.

6.3 Build

Coming out of the Discover phase, we will have an initial backlog of user stories that have been curated and defined with the help of the DOT Product Owner and the Business team. Our technical team will review the desired functionality and draft user story-level solution designs in JIRA that consider broader platform-level or enterprise architecture-level implications.

Our user story-level solution designs get specific. For example, we will define the number and type of new fields to create, the structure of flows (before save/after save/naming convention/parent and child Flow structure), the specific OmniStudio DataRaptor Turbo Extract that is needed to pre-populate application screens, or the exact field mapping and transformation logic needed for a particular integration. We will communicate the solution design clearly and transparently among project team members and will document the history of design decisions made with DOT and DoIT along the way.

Our developers will build in 2-week Agile sprints and perform unit testing before advancing the changes to a Test environment. We do this to ensure quality of code in the Test environment, efficient use of tester time, and to avoid disruption of parallel testing efforts.

We value a 'show not tell' approach to build and therefore demonstrate a working solution at the end of each sprint to DOT Product Owner and staff. Development is an iterative process, and as users see and experience the solution, we will document requested

changes to be prioritized in the product backlog. This real-time feedback and subsequent incorporation into the solution is critical to quality and adoption.

To build a best-in-class, scalable ePermitting solution, we will:

- Continuously draft solution designs on user stories and review them as a team.
- Iteratively build and enhance the Salesforce solution.
- Perform peer reviews to ensure delivery quality.
- Deploy our metadata changes to the Test environment, as changes pass peer review.
- Consult DoIT in case of custom development needs and achieve full alignment.
- Develop the identified system integrations, in collaboration with DoIT.
- Host bi-weekly sprint demos with the DOT team and DoIT team for feedback.
- Test the solution, per the test approach described in **Section 6.4**.
- Perform critical bug fixes if required.

Deliverables | A scalable, thoroughly tested, best-in-class Salesforce solution that is easy to maintain; successful integrations with SoNH payment processor, ArcGIS, Tableau, and relevant Oracle & Access databases; and Salesforce and integrations architecture designs.

6.4 Test

During the Discover Phase, the Slalom QA Lead will work with DOT and DoIT to develop a testing strategy grounded in four core principles: end user feedback is critical, the whole team owns quality, documentation should be lightweight, and everyone should be aligned on priority measures. Fundamentals of our testing strategy include test scope, test types and related processes and techniques, test roles and responsibilities, test sequencing, a defect management process and test reporting.

To test the solution and ensure quality, we will:

- **Track expected test results, defects, and resolutions.** Our test strategy will include a detailed defect management strategy that includes a triage process and method for tracking expected versus actual results across each test type and phase. The process to track expected versus actual results typically involves utilizing defect tasks in Jira and associated test cases that outline expected results for each test step and any actual results that vary from the expected result. Defects will be tracked in Jira and contain a unique ID, link to the related story, all historical test cases and results, and associated priority and status (e.g., Backlog, In Progress, In QA, Ready to be Deployed). Jira reports and custom dashboards will be used to support and summarize defect tracking and resolutions.
- **Prioritize defects and estimate time to resolution.** Slalom has standard definitions of defect priority, shown in Table 3 below, which will be modified to meet contractual obligations, DOT and DoIT needs and expectations.

Table 3 - Defects, Definitions, Priorities, and Expected Time to Resolution

PRIORITY	DEFINITION	EXPECTED TIME TO RESOLUTION	PRIORITIZATION
P1 - Critical	A documented Defect that causes a) Complete application failure or application unavailability; or b) Application failure or unavailability in one or more Authorized Users locations; or c) Systemic loss of multiple essential system functions.	Must be resolved ASAP due to severe impacts to functionality/business, without workarounds	Prioritized for immediate mitigation over all ongoing work items, deployment ASAP, if PROD issue then targeted for hotfix
P2 - High	A documented Defect that causes a) Repeated, consistent failure of Essential Functionality affecting more than one user; or b) Loss or corruption of data.	Resolved quickly due to high impacts to functionality/business, workarounds available	Prioritized immediately within current sprint, targeted for deployment at end of current sprint
P3 - Medium	A Level 1 Defect with an existing Circumvention Procedure, or a Level 2 Defect that affects only one user or for which there is an existing Circumvention Procedure.	Resolved during normal course of development activities	Prioritized for mitigation and deployment within next scheduled release, unless otherwise determined by PO
P4 - Low	A documented Defect that causes failure of Non-Essential Functionality or cosmetic or other Documented Defect that does not qualify as any other service level defect.	Can be fixed after any other higher priority items are addressed	Refined into product backlog via standard prioritization set forth by PO

Expected resolution times will vary based upon the point in the development lifecycle in which the defect is captured. Resolution of defects logged against stories in development will be baked into the 'definition of done' for those stories - an agreed upon criteria that must be complete before the requirement is considered complete. While it is expected for P1 and P2 defects to be resolved prior to go-live, defect prioritization will be led by DOT. We will escalate if these timelines are not met, with mitigation steps to be determined by the DOT Product Owner, Solution Architect, Process Architect and Scrum Master. Escalations include clearly defined implications and resolution options.

- **Implement a testing plan.** We recommend the high-level test phases shown in Table 4. For each test activity where DOT is responsible to execute testing, a Slalom QA team member will ensure the DOT stakeholders understand the test purpose and process and have sufficient support during testing. Note: we do not recommend automated testing for this solution.

Table 4 - Test Plan

	UNIT TESTING	FUNCTIONAL TESTING	SYSTEM & INTEGRATIONS	USER ACCEPTANCE TESTING
Purpose	Developers validate code during sprints before releasing stories for functional testing	Non-Developers perform positive and negative tests to validate acceptance criteria is met	The team replicates real user scenarios from end to end, to validate the full solution & integrations	DOT stakeholders validate functionality is built to handle required tasks in real-world scenarios
Testers	Developer	QA	Project Team	DOT Stakeholders
Support	Solution Architect	QA Lead	QA Lead + QA Testers	QA Lead + QA Testers
Key Activities	1. Ensure that each unit of work is validated against all acceptance criteria 2. Defects will be addressed as prioritized, and the user story will remain "In Progress" until all defects are resolved	1. Validate that the systems are working as expected for all acceptance criteria defined in a user story 2. Conduct both positive and negative tests 3. Document test cases and results	1. Execute end-to-end scenarios to test technical systems work together as a single solution 2. Ensure deployment and manual steps are tracked so that all functionalities are stable in advanced environment(s) 3. Validate system performance is working at expected efficiency via load testing	1. Attend UAT kickoff for awareness of method, schedule, and roles 2. Validate the end-to-end processes work as expected 3. Validate data migrated as expected into the target system 4. Identify defects, training items & future phase enhancement requests
Timing	During sprint	During sprint	For each release	For each release

- **Support and develop test cases for UAT.** The QA Lead will collaborate with key DOT stakeholders to align to the UAT plan and define UAT test cases to reflect the detailed journeys documented in the Discover Phase. As user stories are completed, test cases are created and traced back to specific signed-off user stories and reflect the acceptance criteria of the stories. Test cases will be provided no later than 2 sprints after development and test work is done surrounding that potential case. Test cases will be compiled in a centralized workbook for ease of access for DOT stakeholders.

Deliverables | Test Strategy, UAT kickoff materials.

6.5 Train

Our training approach is rooted in human-centered design and leverages our experience working with commercial and public sector organizations to drive end user adoption. We will build on the knowledge and skills of impacted audiences to deliver a tailored, persona-based training solution that upskills and builds core capabilities for use of the new ePermitting system. We will do this by following 5 principles:

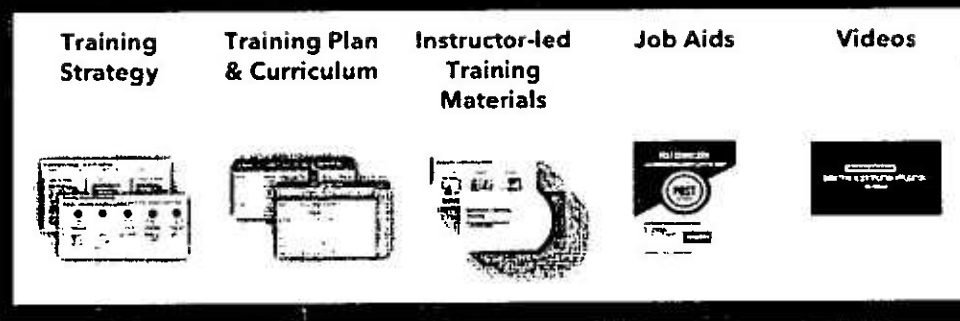
- **Human-Centered:** Keeping in mind people's unique needs, we design experiences that best support learning, aiming to integrate learning in daily workflows and meeting people where they are.
- **Right Place, Right Time:** Offer targeted knowledge through multiple channels where learners can engage as needed.
- **Application-Based and Interactive:** Provide job-relevant, hands-on opportunities for learners to practice and apply new skills and behaviors.

- **Bite-Sized and Progressive:** Deliver in consumable and manageable learning chunks with content expounding on one another to support understanding, adoption, and sustainment.
- **Outcomes-Focused:** Focus on the skills and behaviors needed to enable new ways of working and drive overall business results.

Training In Action - A MA POSTC Experience

A simple illustrative example includes the development of bite-sized videos for POSTC. At POSTC, we found that breaking key activities into small steps and documenting these in bite-sized videos (no more than 5 minutes), allowed users to go about their work with step-by-step, self-directed support, even after formal training had ended. Figure 7 shows thumbnails of some of the training materials we created for POSTC.

Figure 7 - Example Training Deliverables for MA POSTC



To deliver on training outcomes, we will:

- Conduct a change impact analysis that identifies the current and future state, start-stop-continue behaviors, the degree of impact on the success of the program, and impacted personas.
- Perform a learning needs analysis, which details skill gaps and specific training-related mitigation tactics and requirements by persona.
- Use insights from the change impact analysis and learning needs analysis to shape the training strategy and plan that outlines our approach to building the necessary knowledge and skills across personas to enable adoption. It includes the overall performance objectives, training methodologies, required resources for execution, and a detailed roadmap aligned to the program milestones.
- Based on the training strategy and plan, create a training curriculum that is a structured framework of learning courses and resources by persona that guides the learning journey.
- Following the foundational training assessments and planning efforts, we will develop training materials. We will develop the materials concurrently with the technical configuration and build in alignment with key program milestones. Materials will be inclusive of virtual instructor-led sessions, job aids, and bite-sized videos to support visual, auditory, and experiential learners.
- We will deliver instructor-led sessions with demos and interactive exercises to ensure users are equipped with the right knowledge and skills.
- In preparation for training delivery, we will prepare a robust train-the-trainer approach to prepare DOT trainers to become "power users". This will allow DOT trainers to

partner with Slalom trainers during training delivery and to deliver training on the new ePermitting system to new DOT staff in the future.

Deliverables | Change impact analysis, learning needs analysis, training strategy and plan, training curriculum, virtual instructor-led training materials with facilitator guides, virtual Instructor-led training sessions, train-the-trainer sessions, job aids, and bite-sized videos.

6.6 Deploy

Well before the scheduled go-live date, we will develop the artifacts that will support the smooth transition to a new system. We will create a deployment cutover workbook and a deployment go-live readiness checklist that details the owners, timing, and duration of the deployment activities. We understand that DoIT will own the production deployment activities. Depending on whether there are other parallel development initiatives going on at time of go-live, we will partner with DoIT to determine the most appropriate hypercare-specific sandbox environment and deployment strategy. We will identify a Copado deployment path that both enables deployment of hypercare changes to Production with speed and precision and allows other initiatives to remain uninterrupted in the main sandbox pipeline.

Go-live will be scheduled based on DOT and DoIT preference (nighttime, weekend, blackout dates, etc.). We will develop key performance indicators (KPIs) to assess the effectiveness of training through pulse checks and other methods. We will make iterative strategy updates to drive continued progress in preparation for go-live.

Deliverables | Deployment cutover workbook.

6.7 Hypercare and Transition

After the deployment, we will transition into hypercare. In hypercare, we will triage production issues and enhancement requests and update the product backlog accordingly. Priority will be given to resolving critical production support issues. The team will be equipped to replicate the issues in an integrated System Test sandbox environment, address in a designated hypercare development sandbox environment, and assist DoIT in the production deployment activities. In parallel, we will ensure that our solution documentation is refreshed and up to date.

We find successful transitions happen when key members of the support team attend sprint activities to see what is being built and ask questions about designs and design decisions. Recognizing that not all members of the support team can attend sprint activities, during transition we will conduct a design overview, provide thorough knowledge transfer, and perform a handoff of the implemented MVP backlog so that the support and maintenance team is fully equipped with the knowledge to support the system independently. Slalom will provide warranty coverage during a 3-month maintenance phase.

Deliverables | Prioritization of enhancement backlog; final updates to technical designs, training materials, and business process documentation that will be transitioned to the DOT and DoIT team.

7 Assumptions

Table 5 represents our key assumptions for this program.

Table 5 - Assumptions

TOPIC	ASSUMPTION
Professional Services Agreement	The Salesforce Professional Services Agreement between Slalom and SoNH Section xi Warranty Services calls for 24x7 support with on-site support within 4 hours for any warranty claim. Slalom commits to addressing warranty claims within normal business hours. We will work with the State to triage the issue, develop a plan for remedy including timeframe, and agree with the State whether Slalom staff will work on-site or remotely.
Professional Services Agreement	The Salesforce Professional Services Agreement between Slalom and SoNH Section xi Warranty Services calls for "correcting all errors, and defects and deficiencies." For the purposes of this RFQ, warrantable errors, defects, and deficiencies are limited to Severity 1 defects that are caused by faulty workmanship (i.e., documented defects that cause complete application failure or application unavailability; application failure or unavailability in one or more of Authorized Users locations; or systemic loss of multiple essential system functions).
Professional Services Agreement	Slalom has an existing Professional Services Agreement for Salesforce services with the State of New Hampshire and our proposal assumes that we will be able to contract under the existing agreement, which has already been negotiated.
Professional Services Agreement	New Hampshire will own and manage the security of production workloads.
Professional Services Agreement	Slalom requests laptop computers for staff.
Salesforce	Slalom shall have continued reasonable access to necessary State environments, technology, data, and resources for State application development and deployment, using State system environments only as necessary to provide the services.
Salesforce	Salesforce internal and portal user licenses, as well as any additional licenses needed (DocuSign, Digital Engagement, Copado, etc.) will be purchased and available by Sprint 0.
Salesforce	The solution will be built on the core Salesforce platform without any custom development related to mobile devices. The solution will not be tested on mobile devices.
Salesforce	The solution is built in English only.
Salesforce	The project does not have any accessibility requirements related to internal or external-facing functionalities.
Salesforce	Our solution approach assumes document generation and eSignature are included, but change requests, approval/rejection of changes, and redlining of documents are not included.
Salesforce	Document templates and existing permit application forms will be identified by DOT and provided at the start of the Discover Phase as a key input for design.

TOPIC	ASSUMPTION
Salesforce	eSignature solutions for all DOT permit types can be solutioned either via a simple checkbox field on application records, or via the DocuSign AppExchange Managed Package solution. If DocuSign is needed, additional licenses will be made available to Slalom by Sprint 0 to complete eSignature configuration.
Salesforce	The Experience Cloud look and feel will be delivered based on what is available given the declarative Salesforce components (including out-of-the-box Salesforce Community templates). The positioning of components and interactive actions will be determined jointly by the Architect, Developers, the Product Owner and the Business Analysts, given what is declaratively available. Additional custom user experience designs are out of scope for this project.
Salesforce	All permit-related documents will be uploaded and stored as Salesforce Files (up to 2 GB per file). DOT has sufficient file storage space in the Salesforce instance to support the intake of files.
Salesforce	Einstein Bots will be configured to deliver basic Chatbot functionality. Key areas of scope consideration include language(s) supported (assuming English only), # of conversations/use cases supported, level of user experience custom design, number and types of source data inputs (# custom entities and variables).
Salesforce	The payment gateway/processor vendor will be procured, and its testing environment(s) made available to Slalom by Sprint 0. The payment gateway/processor vendor will have a standard/prebuilt way to integrate with Salesforce (e.g., via a Salesforce AppExchange app), with no custom development needs.
Integration	All integrations will be built as point-to-point, with no middleware involvement. Integrations in scope include bidirectional data synchronization between Salesforce and Oracle and Access.
Tableau	Our solution approach assumes the use of Salesforce External Objects and Tableau to produce any reports requiring data from multiple sources / systems. If changes to source databases are required, DOT would own these changes. The standard Tableau Salesforce Connector will be used.
Data Migration	Data migration activities are not in Slalom's working scope. However, should DOT and DoIT require advisory or assistance on data migration activities, we have Salesforce Data Migration expert(s) to support.
Testing	Slalom testing efforts will include test planning, unit testing, functional testing, SIT and UAT. All other types of testing (including regression testing of existing functionalities built by other project teams, penetration testing, accessibility testing, performance testing) are out of scope. DOT will partner with Slalom to plan and prepare for SIT and UAT, determine appropriate DOT participants, and own UAT test case creation and execution within the mutually agreed upon timeframe.
Change Enablement	DOT will own all change enablement activities outside of training for impacted stakeholders. This includes communications, engagement, alignment, etc. Slalom may coordinate training activities with DOT resources engaged in change enablement and communication activities to ensure consistency of messaging but will not be responsible for development and delivery of these activities.

8 Appendix – Resumes of Key Staff



Mike Snively

Solution Architect

RELEVANT EXPERIENCE

Solution Lead - Public Sector Solutions for State Government

A State Commission established to improve accountability in police officer conduct and training compliance was seeking a partner to establish a technology platform that allowed it to meet regulatory mandates. Mike was responsible for defining, designing, and implementing an enterprise Case Management System (CMS), driving transparency within the law enforcement community and the broader public. Close collaboration with key Commission personnel and law enforcement was required to translate legal regulations into procedures and best practices.

Solution Lead - Mergers & Acquisitions

Following an acquisition, a Technology company was seeking a fast moving and comprehensive Case and Knowledge Management solution for both customers and internal customer success staff. Mike defined and estimated solution delivery based on business priorities and led the 3-month implementation to bring two customer success organizations together with a unified business process and technology systems.

SKILLS

- Design, build, and deploy Salesforce enabled solutions across multiple industries. Deep expertise with Public Sector Solutions, and State & Local Government industry.
- CRM assessments and implementation engagements
- Strategy and product roadmaps for clients along the CRM journey
- CRM and Industry Best Practices
- Business Process Design

CERTIFICATIONS

- Salesforce Public Sector Solutions (PSS) Accreditation
- Salesforce Sales Cloud Consultant
- Salesforce Service Cloud Consultant
- Salesforce Advanced Administrator
- Salesforce Administrator
- Salesforce App Builder



Nick Vogler

Lead Salesforce Consultant

RELEVANT EXPERIENCE

**Business Analyst/Salesforce Configuration -
Public Sector Agencies**

- Saved the Commonwealth over 15M in hard cost and employee efficiency and reduced transaction time by 8 days by transforming paper-based benefit enrollment experience to digital for over 200,000 Commonwealth employees. Implemented and administrated a case management system, user portal, document imaging/scanning system, and e-forms.
- Researched, tested, and implemented competing software products to find best fit for data migration from Salesforce to integrated SharePoint solution.
- Implemented multiple high-visibility projects across Public Sector agencies and worked with C-Suite stakeholders to document business process and implement technical functionality which follows government regulations.

**Salesforce Configuration - Medical Device
Company**

- Configured system enhancements including flows, formula fields, system validations, and approval processes for case management teams during global release of new medical device. Migrated enhancements and data from sandbox environments to production using Copado.
- Developed enhancements for Partner Experience Cloud sites including web pages and sharing/visibility architecture to enable Partners to log cases.
- Led encryption effort to harden field security and preserve system scalability.

SKILLS

- System Configuration
- SQL/SOQL
- Tableau Desktop
- DocuSign
- Data Visualization/Analysis
- Business Analysis

CERTIFICATIONS

- Certified Salesforce Service Cloud Consultant
- Certified Salesforce Sales Cloud Consultant
- Certified Salesforce Experience Cloud Consultant
- Certified Salesforce Platform App Builder
- Certified Salesforce Admin
- Certified Salesforce Advanced Admin



Darby Drake

Salesforce Developer

RELEVANT EXPERIENCE

Salesforce Architect - Grants Management, Salesforce Non-Profit Cloud

As the Salesforce Architect, I provided oversight to a team of consultants to overhaul the grants management process for an organization managing over \$4 million. We updated automation for donor segmentation, rebuilt an integration for their financial system, and provided reports for their board of directions. By doing this project, the organization can not only apply for more funding, but also build a long-term strategy for providing funding as well.

Salesforce Architect - Youth Sports Non-Profit, Salesforce Non-Profit Cloud

As the Salesforce Architect for a Sports-Based Youth Development Program, she implemented the Non-Profit Program Management Module, leading a team of 5 consultants to improve tracking attendance, training, and reporting for over 20 locations and 1,000 students. The solution was easy to maintain, scalable, and has made this organization a leader in their non-profit space.

Salesforce Architect - Medical Device, Salesforce Health Cloud

As a Salesforce Architect on an international program, she led a team of Salesforce configurators through a new product LMS implementation with complex integrations with DocuSign and email automation. She collaborated with other technical architects to ensure all the solutions aligned and acted as a release manager for continuous deployment before go-live.

SKILLS

- Salesforce Administration
- Service and Sales Cloud
- Non-Profit Cloud
- Salesforce B2B Commerce
- Business Process Design and Optimization
- Data Loader
- Copado Release Management
- DocuSign Administration

CERTIFICATIONS

- Community Cloud Consultant
Salesforce Certified Administrator
- Salesforce Certified Sales Cloud Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Field Service Lightning Consultant
- Salesforce Certified Experience Cloud Consultant



Jack Gorman

Salesforce Developer

RELEVANT EXPERIENCE

Consultant - Public Sector Grant Management

Contributed to the design and implementation of a constituent-facing Salesforce Experience Cloud site to support the application process for municipal grant procurement. Configured integrations and installed packages for efficiency in e-signature and document sharing. Provided demonstrations of configured functionality and implemented changes based on stakeholder feedback. Provided expertise in security and access, automation, and declarative configuration with the Public Sector Solutions package.

Consultant - High Tech

Work with a local Boston IT security firm on a CPQ discovery project. Conducted requirements gathering and stakeholder interviews across multiple departments to design a quote-to-cash solution. Created an intake process for org enhancements, defining a release cadence, and performing system enhancements and deployments on behalf of the client team.

Consultant - Entertainment

Service Cloud configuration on a large Salesforce org migration for an entertainment giant. Migrated existing functionality and implemented new functionality. Tackled complex tech debt retirement via migration of process builders to flow automation. Developed expertise in Copado to perform deployments. Conducted agile tasks such as peer reviews, user story pointing, and story assignment in addition to client-facing bi-weekly demos.

SKILLS

- Declarative Automation & Configuration
- Data Loader & Data Migration
- Solution Design
- Copado Deployments

CERTIFICATIONS

- Administrator
- Sales Cloud
- Service Cloud
- Experience Cloud
- Platform App Builder
- User Experience Designer
- Sharing and Visibility Architect
- Certified Business Analyst
- Certified Associate



Sounder Rajan Sridharan

Integration Developer

RELEVANT EXPERIENCE

Enterprise Architect/ Integrations Architect - several IT Modernization programs (Health Devices Industry)

- Develop Gap Analysis and Roadmap for modernizing Security, DevOps and Integrations framework.
- Develop Integration Strategy for large scale Digital Transformation initiatives, including ERP and CRM Modernization.
- Drive towards Business/ IT Alignment with EA Artifacts and Integration Design.
- Develop Integration flows on MuleSoft's Cloudhub Platform. Plan technical efforts.
- Develop Coding and DevOps Frameworks to streamline build and deploy processes.

Data Migration Lead - CRM Replacement. High Tech Company Acquisition (Data Software Industry)

- Develop Data Migration strategy to replace legacy CRM System.
- Develop workflows on Boomi Platform for Data Migration (Full load/ delta load processing).
- Develop Technical Solutions to Data and Environment errors.

Integration Architect - Rewards and Loyalty program (Retail Industry)

- Design Integration Applications that enable Digital journeys for Mobile App Users.
- Develop Strategy for Migrating Integration Apps from IBM's Suite to MuleSoft Platform.
- Coordinate with DevOps to enable CI/ CD and Integration Platform setup.

SKILLS

- Dell Boomi, MuleSoft,
- IBM Cloud, Azure, AWS
- Java, Node.js, OpenAPI
- IBM API Connect
- Integration and Enterprise Architecture
- API Security (OAuth, JWT, etc.,)
- SQL/ No-SQL Database
- MQ, Kafka

CERTIFICATIONS

- MuleSoft Certified Integration Architect
- MuleSoft Certified Developer
- Dell Boomi Professional Developer
- IBM Certified Integration Developer



Greg Vavoules

Data Visualization Specialist

RELEVANT EXPERIENCE

Visual Analytics & Data Architecture -Public Sector

Greg installed a large 10-node public-facing Tableau environment using AWS and created embedded dashboards that have been viewed over 10 million times since launch. He helped install the cluster with best practices around performance, security, and functionality. The dashboards were made to be ADA compliant and utilized complex data suppression.

Visual Analytics & Data Architecture -Health Insurance

Greg designed a migration roadmap to move the client from Tableau Server to Tableau Online. He assessed the current state and provided REST API templates to get info from the Tableau Server repository, developed a retention policy and URL redirect process, process for starting Tableau Bridge, and actual steps needed during the migration.

SKILLS

- Tableau
- Data architecture
- AWS
- Snowflake
- MySQL
- Data engineering
- Python
- dbt
- Power BI
- Azure
- Redshift
- Salesforce
- R
- Alteryx

CERTIFICATIONS

- Tableau Desktop Professional
- Tableau Server Associate
- AWS Certified Cloud Practitioner
- AWS Certified Machine Learning - Specialty
- Microsoft Azure AI Fundamentals
- Salesforce Einstein Analytics & Discovery
- Salesforce CPQ Specialist



Nate Higgins

Client Partner

RELEVANT EXPERIENCE

Contract Manager - New Hampshire DOT Asset Management Statewide Contract (Prior firm)

Nate has worked with New Hampshire DOT for nearly a decade, helping the agency navigate software implementations. He facilitated a design sprint to design a bridge management system and led workshops to hone in on user cross-capability user needs for a work order, fleet, and inventory management system. He led the effort to develop the transportation asset management plan (TAMP) and reimagined its construction cost index methods.

Client Partner - Keolis WebACES Industrialization

Transportation subject matter expert to help the technical team navigate the business of rail. Developed a business case for Keolis that directly relates to MBTA strategy.

Client Partner - MBTA GM Dashboards

Transportation subject matter expert to help the technical team navigate the business of transit. Aligning Tableau visuals for safety, operations, human resources, and capital.

Project Manager - Asset Management Strategic Plan | MassDOT

Led an effort to develop a comprehensive asset management strategic plan for all highway-related technology applications that articulated a cloud strategy, technical architecture, data collection strategy, organizational design, and technology strategy, and data governance plan.

SKILLS

- Client relationship management
- Program and project management
- Transportation SME
- Performance measure analytics
- Technology strategy
- Facilitation
- Writing

HIGHLIGHTS

- Strategy- Strategic plans, facilitation, and workshops for asset management, risk, capital planning, data, and technology
- Analysis- Transportation system performance
- Thought Leader - Leader of national research



Trish O'Neill

Project Manager / Scrum Master

RELEVANT EXPERIENCE

Engagement Lead & Solution Arch | Public Sector

Led a Salesforce Development & Change Management team of 10 in designing and launching a case management system to streamline processes and operations related to law enforcement officer standards and certifications, including the implementation of an online portal. Tricia provided leadership and oversight, as well as expertise in business architecture, requirements gathering, and solution design.

Engagement Lead | Information Security

Led a globally-distributed Strategy & Operations team of 7 in designing an intuitive partner portal experience to improve satisfaction and add value to constituents. Tricia provided expertise across process design and business architecture, cultivating in a program roadmap to create a scalable, transparent, and accurate system.

Engagement Lead | Healthcare

Tricia led a 6-month Agile engagement with team aimed at building and enhancing a new customer onboarding portal leveraging Salesforce Experience Cloud and Service Cloud. Tricia participated in business requirements gathering and helped coach stakeholders in understanding architecture dependencies and prioritization of features. Tricia facilitated ongoing daily standups, backlog refinement, user acceptance testing, collaborative sprint planning with clearly established sprint goals, and iterative releases, while also coaching team members in Business Analyst best practices.

SKILLS

- Program & Project Management
- Risk Management
- Agile/Waterfall Delivery
- Stakeholder Analysis & Management
- Team Building and Communication
- Project Performance Reporting & Analysis
- Process and Operations Improvement
- Business Analysis
- Workshop Facilitation
- Functional Testing / Defect Management
- Salesforce (Service, Sales, and Community Clouds)
- Jira, Confluence, Miro

HIGHLIGHTS

- Cross-Industry Experience: Healthcare, Public, Information Security, Energy
- Requirements Gathering Workshop Facilitation



Jaymi Cohen

Process Architect

RELEVANT EXPERIENCE

Salesforce Process Lead | Government Agency

Led the discovery and implementation of a Salesforce Public Sector Solutions Grants Management system. Led interviews, focus groups, and process improvement sessions with key stakeholders to design and refine the future state of managing community grant programs. The agency will be equipped with an organized, highly accessible centralized system with easy-to-find, accurate, and efficiently managed information.

Salesforce Business Analyst | Government Agency

Led the requirements gathering and process improvement discovery to improve a public facing Salesforce portal used by a government agency. Developed the high-level design and roadmap for the future state aligned with recent policy changes.

Project Manager | Life Sciences

Managed a team to conduct a gap assessment of requirements and processes for a cell and gene therapy company's electronic traceability system in Salesforce. Finalized requirements, facilitated User Acceptance Testing and Validation protocols with the business and updated Work instructions and Standard Operating Procedures to reflect updated system processes prior to the launch of the system.

Project Manager | State Medicaid Site Assessment System

Led the development of a virtual site assessment process to ensure Medicaid HCBS Final Rule compliance at the federal and state levels. Managed the operations of conducting 1,200 site assessments of aging and disability settings and services. Determined compliance levels by setting, compiled compliance level data, and provided visual data analytics using Power BI.

SKILLS

- Strategy & Process Optimization
- Project Management
- Operating Model
- Communications & Stakeholder Engagement
- Training Design, Development, & Delivery
- Policy Analysis
- Rate Methodologies & Rate Setting
- Accessibility

HIGHLIGHTS

- Government/Public Sector
- Transportation
- Aging and Disability
- Medicaid
- Healthcare
- Mental Health
- Education



Andy Meigs

Quality Lead

RELEVANT EXPERIENCE

Quality Assurance Lead- Healthcare

A leading wearable medical device firm needed a new Salesforce Sales and Marketing platform as well as a new customer-facing portal to support its continued rapid growth. Andy coordinated all aspects of testing for the effort, including designing the program test strategy and spinning up a testing team to support the work of 8 scrum teams. He coordinated successful Data Migration and Integrations testing. He ensured key test cases were prioritized for automation and coordinated delivery of an automated test suite covering all core functions of the system.

Quality Assurance Lead- Healthcare

A top provider of dialysis equipment and technology wanted to implement Salesforce to better enable its sales and marketing processes. Andy organized the project's test strategy, directed testing progress and organized successful virtual User Acceptance Testing prior to a go-live to roughly 100 users.

Business Analyst- Management Consulting

A leading management consultancy wanted to implement a state-of-the-art knowledge management system. He crafted test cases, conducted manual testing, and helped to develop and communicate QA processes and best-practices within his scrum team. This ultimately led to a successful deployment to over six thousand weekly active users and a double-digit increase in user satisfaction compared to the old system.

SKILLS

- Quality Assurance
- Project Management
- Business Analysis
- Salesforce
- Requirements Gathering
- Business Intelligence

CERTIFICATIONS

- Certified Scrum Master



Cormac Malley

Business Analyst / Quality Analyst

RELEVANT EXPERIENCE

Business Analyst - Public Sector (Salesforce)

Supported a public sector project as the BA, contributing significantly to the discovery and design process, working closely with client stakeholders to design and develop their internal business processes, define a workflow, and document all relevant requirements, needs, and information. Managed a user story backlog in Jira, developed the project testing plan, and led discussions between the client and the internal Slalom team to ensure we gathered and captured all necessary information.

Quality Analyst - Public Sector (Salesforce)

Supported a public sector client as the quality analyst, ensuring all Slalom built features in the Salesforce environment met the acceptance criteria, testing to ensure working functionality, and a good user experience. Developed comprehensive test cases for all features and stories to ensure every aspect of a feature had been tested across all necessary personas. Logged bugs and managed the defect resolution process.

BA/QA Support - Health Technology (Salesforce)

Provided support across all aspects of the Salesforce development project. Contributed to requirements gathering, note taking, process mapping, backlog grooming, test case development, and UAT activities.

SKILLS

- Business Analysis
- Business Planning
- Quality Assurance
- Change Management
- Project Management
- JIRA
- Business Process Analysis
- Agile Program Management
- Proposal Management
- Market Research
- Problem Solving

CERTIFICATIONS

- Certified Salesforce Administrator



Andrew Bunyard

Training Lead

RELEVANT EXPERIENCE

Adoption And Enablement | Health and Human Services

Served as Business Readiness Lead on a statewide Health and Human Services agency Integrated Eligibility System (IES) implementation project with a focus on managing key people readiness responsibilities, including communications, training, and change management efforts. As a result of this work, more than 9,000 employees were engaged and trained prior to the launch of an IES system serving approx. 1.5 million residents.

Training Design and Delivery | Health And Human Services

Managed the development and delivery of adoption readiness training for a data analytics platform implementation for a state Health and Human Services agency. Responsible for preparing ~50 employees to utilize data analytics and visualization tools for key executive-level, public-facing, and federal regulatory reporting.

Business Readiness | Health and Human Services

Served as a member of the training and operational readiness team for a large-scale business process redesign effort. Helped develop curriculum and facilitate training for over 1,200 state employees; executed computer-based and workshop-style classroom training sessions in conjunction with business process redesign efforts.

SKILLS

- Change Management
- Training Development and Delivery
- Communication Management
- Integrated Eligibility Systems (IES)
- Business Intelligence & Analytics
- Data Visualization
- Salesforce
- Learning Management Systems
- ERP Systems

CERTIFICATIONS

- Project Management Professional (PMP®)
- Certified SAFe® 5 Agilist



Kathleen Hughes

Training Consultant

RELEVANT EXPERIENCE

Change Enablement and Learning Strategy - Public Sector

Served as Training and Change co-lead on organization-wide core system implementation for customer-facing state agency. Developed communication and change management road map to align leadership and staff on key business goals and project milestones. Led a team to develop and deliver training content to front-line staff across the Commonwealth. Consulted with senior leadership to identify business objectives, organizational capabilities, and performance requirements.

Business Transformation - Insurance

Developed framework for new operating model for organization implementing a new product across three newly merged entities. Developed communication plan and content to create awareness and buy-in of the new product and operating model. Created training plan and content to drive adoption of new processes and technologies for leadership and staff, including videos and SOPs.

Training Design and Deployment - Insurance

Managed the development and deployment of training for operations unit across multiple initiatives, including CRM email messaging feature, supervisory training on key performance indicators. Created content to develop staff awareness of self-service web tools to drive customer adoption.

SKILLS

- Change Management
- Training Development and Delivery
- Communication Planning
- Process Improvement
- Standard Operating Procedures
- Learning Management Systems
- Project Management
- Multimedia Design
- Speaking and Workshops

CERTIFICATIONS

- Certified Professional for Learning and Performance (CPLP)



Allen Mann

Digital Service / Chatbot SME

RELEVANT EXPERIENCE

Digital Service Architect, International Hotel Client

Functioned as a Technical Architect for a development team that delivered a range of solutions using Salesforce Digital Engagement (WebChat, SMS, Einstein Bots) and Salesforce Service Cloud.

Digital Service Architect, Digital Streaming Provider

Functioned as a Technical Architect for a development team that delivered a custom Service Cloud solution that allows agents to customize Omni Channel audible notifications and tab highlight behavior for real-time customer engagement visibility.

Digital Service Architect, Multiplatform Television Commerce Provider

Functioned as a Technical Architect for a development team that delivered an Einstein Bot implementation that support 4 brands with one bot, lookup order status from an external system, recognize website authentication state, and understand customer inquiries via natural language processing (NLP).

Presales support for Salesforce Digital Engagement

Act as a guide for customers on what they should implement and in what order to best meet their goals. Working through relevant use cases and making prioritization suggestions to best address organizational goals.

SKILLS

- Customer Relationship Management (CRM)
- Salesforce Sales Cloud, Service Cloud, Community Cloud, Service Cloud Voice and Digital Engagement Implementations
- AWS Connect
- Development, Business Process Analysis, Solution/Technical Architecture
- Agile/Scrum and Hybrid Methodology for Software Development
- Project Leadership
- Salesforce Development Lead

CERTIFICATIONS

- Salesforce Certified System Architect
- Salesforce Certified Application Architect
- Salesforce Digital Engagement Accredited



Ryan Dowski

Public Sector Solutions SME

RELEVANT EXPERIENCE

Team Lead / Solution Owner - State Government

Oversaw multiple projects and workstreams with State clients focused on Public Sector Solutions, custom Service Cloud and Experience Cloud implementations. Ryan brought extensive knowledge of Public Sector, Salesforce best practices and Agile where he served as a solution architect, project manager, functional lead. He also worked as the primary point of contact between external stakeholders and the consulting teams.

Solution Architect / Senior Consultant - Federal Government

Worked with Federal Clients to implement large Service and Experience Cloud implementations. Served as Solution Architect and Lead Functional consultant conducting requirements gathering sessions and stakeholder interviews across large matrix offices and departments. Ryan performed Solution demos to high-ranking Government officials fostering deeper relationships with the client team. Ryan also partnered with Product Owners to create a streamlined process for enhancements, defining priority levels based on return on investment and scheduling them into a defined release cadence.

Solution Architect / Lead Consultant - Non-Profit

Served as the Lead consultant on an enterprise proof of concept Salesforce rollout to migrate a large Non-Profit organization to Salesforce from disparate legacy systems. Ryan leveraged an agile framework and methodologies to show proof of concept through performing stakeholder interviews, creation of personas, requirements gathering, conducting solution design, change management, communication strategy & rollout, and performed end user training. After the successful proof of concept, Ryan served as the program lead migrating the whole enterprise over to Salesforce powered by Sales and Non-Profit Cloud.

SKILLS

- Solution Design
- Business Process Improvement
- Government & Public Sector
- Declarative Automation & Configuration
- Agile Methodologies
- Six Sigma Black Belt

CERTIFICATIONS

- Administrator
- Advanced Administrator
- Certified Associate



Yiling Zhang

ESRI / Copado SME

RELEVANT EXPERIENCE

Technical Architect - POSTC

Responsible for PSF-related data model design, declarative and coding metadata solution reviews, management of unlocked packages and the entire DevOps deployment pipeline, including bi-weekly go-live deployments.

Delivery Oversight - City of Boston's Planning & Development Agency (BPDA)

Provided delivery guidance to the BPDA project team, on specific topics including technical solution architecture, ArcGIS implementation approach, cutover planning, and technical knowledge transfer.

Technical Architect - Public Sector Online License Management System Solution Design

Responsible for leading technical Discovery conversations to enable public constituents to apply for, renew and look up their Licenses via an external-facing Experience Cloud experience. Designed the future state technical architecture and system integrations, identified data migration needs, and laid out key delivery risks.

Technical Architect - Life Sciences, Global Customer Experience Implementation in EMEA

Responsible for the overarching Salesforce technical solution design and delivery. Led a large-scale program team to deliver an E2E global customer experience to 15+ User Personas in 5 different EMEA countries, implementing Sales Cloud, Service Cloud, Health Cloud, Experience Cloud, Marketing Cloud and MuleSoft. Spearheaded the Salesforce DevOps strategy and workstream for 2.5 years, leveraging Copado as the tool, defining leading practices for 50+ Development resources.

SKILLS

- Salesforce Solution Design and Implementation
- Business Analysis and Process Mapping
- Salesforce Architecture

CERTIFICATIONS

- System Architect
- Application Architect
- Platform Developer I & II
- Platform App Builder
- Advanced Administrator, Administrator
- Sales, Service, Community Cloud Consultant
- CPQ Specialist
- Field Service Lightning Consultant
- Nonprofit Cloud Consultant
- Marketing Cloud Email Specialist/Administrator/Developer



Julien Ouellet

ESRI / Doc Gen SME

RELEVANT EXPERIENCE

Solution Architect - Public Sector

Managed discovery and delivery of multiple extensions to an existing Salesforce environment across functional and technical teams, including development of a custom ArcGIS mapping component and service process automations, in under 2 months.

Technical Architect - Healthcare

Managed enterprise architecture design and offshore development team throughout successive implementations of transformative Salesforce functionality, including custom Partner Community, Lightning Scheduler, eSignature, and external asset management.

Technical Architect - Insurance

Designed and executed a complete Salesforce system architecture with over 20 synchronous, asynchronous, batch, and user interface integrations using MuleSoft. Applied best practices to optimally support millions of records with limited customizations in a Lightning-only user interface. Managed dedicated development resources over 15 Agile sprints, leveraging SalesforceDX, source control, code reviews, and continuous delivery. Trained client resources on best practice Salesforce environment management and deployment processes.

SKILLS

- Enterprise Architecture
- DevOps Tools & Practices
- Web / Portal Development
- ETL Processes and Data Mapping
- Business Process Design and Implementation

CERTIFICATIONS

- Salesforce Application Architect
- Salesforce System Architect
- Salesforce Integration Architect
- Salesforce Platform Developer
- MuleSoft Certified Developer



John Hecker

Payment SME

RELEVANT EXPERIENCE

Technical Architect

Led integrations with multiple gateways, process design and architecture, full ledger development; architected a processing system on Salesforce with direct bank integration.

Solution / Technical Architect

Led the design and implementation of Salesforce Service Cloud to sit within FEDRamp compliant boundary supporting US Federal customers and securely handling sensitive data.

Director of Architecture

Lead technical strategy and technical product delivery for national scale Claims Management system. Designed and implemented delivery methodology and governance practices. Also designed and delivered complex, secure applications with high data volume leveraging Service Cloud, Communities, and Tableau CRM in environments containing PHI, PII, and PFI.

Technical Architect

Lead technical delivery of concurrent Sales and Service Cloud implementations to replace legacy .NET applications. Created a custom event monitoring application and worked with client IT to model data more efficiently across multiple systems within the organization.

SKILLS

- Requirements Gathering & Analysis
- Enterprise Technology Strategy
- Security and Compliance
- Solution Design & Architecture
- Technical and System Architecture
- Integration Architecture
- Manage Project Delivery
- Sales Cloud
- Service Cloud
- Experience Cloud
- Financial Services
- Insurance Services
- Payment Processing

CERTIFICATIONS

- Salesforce Administrator
- Platform App Builder



Kristen Erickson

UI / UX Designer

RELEVANT EXPERIENCE

UX Design Lead - Insurance App & Website

Kristen was brought in to lead the UX efforts for two agile teams- projects included a redesign of the client's internal SharePoint site and consumer facing application. Leveraged existing research and analytics then conducted usability tests to validate designs. Facilitated sessions with users and stakeholders to define information architecture and crafted creative visual designs that adhered to established brand standards.

Product Design Lead - Health Benefits Enrollment Platform

Created end to end designs from concepts to high fidelity visual design and graphics. Collected and analyzed data to inform and validate designs and prioritize upcoming work. Worked collaboratively with engineers, product managers and key stakeholders in an agile environment.

Product Design Lead - Higher Education Learning App

Managed the design team responsible for the desktop and mobile platforms of a SaaS product used at colleges and universities nationwide. Led the user centered design process from user research to wireframes and final visual designs. Conducted demos and training sessions to onboard new clients. Notable clients include Duke University, University of Chicago, New York University and University of Pennsylvania.

SKILLS

- User Experience Design
- Visual Design
- User Research and Usability Testing
- Information Architecture
- Interaction Design
- Design Systems
- Low and High-Fidelity Prototyping
- Illustration
- Branding

About Slalom

Slalom is a purpose-led, global business and technology consulting company. From strategy to implementation, our approach is fiercely human. In six countries and 43 markets, we deeply understand our customers—and their customers—to deliver practical, end-to-end solutions that drive meaningful impact. Backed by close partnerships with over 400 leading technology providers, our 12,000+ strong team helps people and organizations dream bigger, move faster, and build better tomorrows for all. We're honored to be consistently recognized as a great place to work, including being one of Fortune's 100 Best Companies to Work For seven years running. Learn more at slalom.com.

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The Slalom logo, consisting of the word "slalom" in a lowercase, bold, sans-serif font.

slalom.com

STATE OF NEW HAMPSHIRE
Department of Administrative Services
Division of Procurement and Support Services
Bureau of Purchase and Property
State House Annex
Concord, New Hampshire 03301

Posting Date: December 28, 2022

NOTICE OF CONTRACT ADDENDUM
(NEW AGENT)

COMMODITY: Salesforce Professional Services

CONTRACT NO.: 8002977

NIGP: 920-0000

VENDOR: Slalom LLC **VENDOR #:** 318836 P001
399 Boylston Street
Suite 1000
Boston, MA 02116

CONTACT PERSON(s): Casey Bolger.
Tel. No.: 617-640-0092
E-Mail: caseyb@slalom.com

CONTRACT PERIOD: October 13, 2021 through December 31, 2023

PAYMENT TERMS: Net 30

PAYMENT: Payments shall be made via Procurement Card (P-Card –Credit Card) or ACH*.
Orders charged upon delivery/shipment.

*If the agency is enrolled in the P-card Program, payments shall be made via P-card. The resulting contract has mandatory Procurement Card usage for agencies enrolled in the State P-Card Program.

INVOICING: Invoices shall be submitted after completion of work to the requesting agency. Payment shall be after receipt of invoice and acceptance of the work to the State's satisfaction. Each RFQ/SOW may contain more detailed invoicing requirements.

DELIVERY TIME: Shall be defined in the SOW/RFQ.

MINIMUM ORDERS: There is no minimum order required under this contract.

ORDERING: State will request quotations by providing a RFQ/SOW describing the services required and the applicable technical qualifications. The quoted hourly rates shall not exceed the rates established under this Contract. The RFQ/SOW shall be issued to all contractors under this Contract for a quote. The project engagement will be based upon the lowest cost qualified quote.

Projects solicited through the State's RFQ process will be conducted in cooperation with the New Hampshire Department of Information Technology (DoIT) and utilizing State agency DoIT coordinates, reviews, and approves statewide Information Technology activities to ensure consistency and alignment with State strategic efforts. A DoIT approval letter must accompany each RFQ/SOW.

QUESTIONS: Direct any questions to Claudia Roy, 603-271-2202, Claudia.L.Roy@das.nh.gov

F.O.B.:

F.O.B. Destination to any location within the State of New Hampshire.

ELIGIBLE PARTICIPANTS:

Political sub-divisions (counties, cities, towns, school districts, special district or precinct, or any other governmental organization), or any nonprofit agency under the provisions of 501c of the Federal Internal Revenue Code, shall be eligible to participate under this contract whenever said sub-division or nonprofit agency so desires.

USAGE REPORTING:

Contractor shall be required to submit usage reports for analysis to the Division of Procurement and Support Services, Purchasing Agent/Contract Manager.

- Contract Number (State of New Hampshire Contract # and Multi-State Contract Number/Agreement Reference).
- Utilizing Agency and Eligible Participants
- Items sold and/or all products purchased (showing the Manufacturer, item, part number, and the final cost)
- Total cost of all products purchased. Ability to sort as needed from any category, including Agency and/or eligible participant
- Excel or CSV formatted document or other compatible document

PRODUCTS & PRICING:

Contractor shall provide the services at the not-to-exceed hourly rate set in the Table below. This pricing for hourly staff or Project staffing shall be effective for the term of this Contract, any extensions thereof and the Statement of Work.

Position	Year 1 Contract Approval – 12/31/21	Year 2 1/1/22 – 12/31/22	Year 3 1/1/23 – 12/31/23
	Hourly Rate Not to Exceed	Hourly Rate Not to Exceed	Hourly Rate Not to Exceed
Program Manager	\$245.00	\$252.35	\$259.92
Scrum Master	\$205.00	\$211.15	\$217.48
Salesforce Technical Architect	\$255.00	\$262.65	\$270.53
Salesforce Administrator	\$215.00	\$221.45	\$228.09
Salesforce Platform Developer	\$215.00	\$221.45	\$228.09
Salesforce Data Architect	\$255.00	\$262.65	\$270.53
Salesforce Business Analyst	\$190.00	\$195.70	\$201.57
Salesforce Training Consultant	\$205.00	\$211.15	\$217.48



State of New Hampshire

DEPARTMENT OF ADMINISTRATIVE SERVICES

25 Capitol Street - Room 120
Concord, New Hampshire 03301

Office@das.nh.gov

Charles M. Arlinghaus
Commissioner
(603) 271-3201

Joseph B. Bouchard
Assistant Commissioner
(603) 271-3204

Catherine A. Keane
Deputy Commissioner
(603) 271-2059

August 20, 2021

His Excellency, Governor Christopher T. Sununu
and the Honorable Council
State House
Concord, New Hampshire 03301

REQUESTED ACTION

Authorize the Department of Administrative Services to enter into a contract with Slalom, LLC of Boston, MA (Vendor No. 318836), for an aggregate price limitation of \$10,000,000.00 among all awarded vendors, for Salesforce Professional Services. The term shall be effective upon Governor and Council approval and ending on December 31, 2023 with the option to extend for two (2) additional one-year extension terms.

Funding shall be provided through individual agency expenditures, none of which shall be permitted unless there are sufficient appropriated funds to cover the expenditure.

EXPLANATION

The Department of Administrative Services, through the Bureau of Purchase and Property, and in collaboration with the Department of Information Technology, issued a request for proposal on February 3, 2021 with responses due on March 3, 2021. There were 11 compliant responses received.

It is the Department's intent to enter into contracts with the 10 highest scoring vendors where through a Request for Quote (RFQ) and Statement of Work (SOW) process the Department of Administrative Services, on behalf of a requesting State agency, will issue RFQ/SOW to all contractors. Each SOW will detail various requirements related to the services, planning and implementation of new projects. The project engagement will be based upon the highest scoring response. Project engagements under the agreements with a dollar value exceeding \$10,000 shall be brought before the Executive Council for approval prior to proceeding with the engagements.

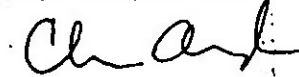
His Excellency, Governor Christopher T. Sununu
and the Honorable Council
August 20, 2021
Page 2 of 2

As the State's experience and expertise with Salesforce matures, It will expand its Salesforce capabilities and services offered. The production Salesforce environment is centrally managed. The State has implemented an Enterprise Government Model that seeks to establish Standard Operating Procedures (SOP) and processes on the use of third party solutions.

Through the proposed contracts, the State anticipates improvements in the following areas: automating business processes, providing prompt responses to tracking or delivering constituent needs, refining business operations based on access to insightful data, securing information within compliance of State and Federal regulations, and deploying rapid solutions throughout the State of New Hampshire's IT environment.

Enabling these capabilities will often require the use of expert resources that can assist the State to efficiently design, govern, maintain and provide ongoing management of these platforms in a secure, responsible and effective manner. Contracting mechanisms that shorten the "time to value" are needed to procure resources to work with State agencies and IT staff to supplement existing constrained resources that are needed to provide the skills necessary for the State to excel in its Digital Government Initiatives. Based on the foregoing, I am respectfully recommending approval of the contract with Slalom, LLC.

Respectfully submitted,



Charles M. Arlinghaus
Commissioner



Division of Procurement Support Services
Bureau of Purchase Property

Gary S. Lunetta
Director
(603) 271-2201

Bid Description	Salesforce Professional Srvc	Agency:	Statewide
Bid #	RFP 2425-21	Requisition: #	N/A
Agent Name	Paul Rhodes	Bid Closing:	3/3/21 @ 10:00 AM

Tech Mahindra	92.9
CoreSphere	90.9
Deloitte	87.1
MTX Group	86.0
22nd Century	82.6
Spruce Tech	82.5
Catalyst	80.0
Brite Systems	79.7
Publicis	
Sapient	79.5
Slalom	75.2
AquaLagoon	64.0



STATE OF NEW HAMPSHIRE
DEPARTMENT OF INFORMATION TECHNOLOGY
27 Hazen Dr., Concord, NH 03301
Fax: 603-271-1516 TDD Access: 1-800-735-2964
www.nh.gov/doit

Denis Goulet
Commissioner

August 12, 2021

Charles M. Arlinghaus, Commissioner
Department of Administrative Services
State of New Hampshire
25 Capitol Street
Concord, NH 03301

Dear Commissioner Arlinghaus,

This letter represents formal notification that the Department of Information Technology (DoIT) has approved your agency's request to enter into seven (10) contracts as described below and referenced as DoIT No. 2021-081.

The ten (10) contracts being requested are for:

1. Brite Systems Inc. of Indianapolis, IN
2. Catalyst Consulting Group, Inc. of Chicago, IL
3. Spruce Technology, Inc. of Clifton, NJ
4. Deloitte Consulting LLP of Concord, NH
5. Coresphere, LLC of Bethesda, MD
6. MTX Group of Albany, NY
7. 22nd Century Technologies, Inc. of Mclean, VA
8. Tech Mahindra Americas Inc. of Plan, TX
9. Sapient Corporation d/b/a Publicis Sapient of Boston, MA
10. Stalom, LLC of Boston, MA

This is a request to enter into a statewide contract with ten (10) vendors to allow agencies to release RFQ's/SOW's for Salesforce Professional Services. These contracts will provide a mechanism for agencies requiring assistance with ongoing and future projects. Currently, all applications are internally focused and used exclusively by State agency personnel; public data submission is currently done through web to case. It is anticipated that as the State's experience and expertise with Salesforce matures, it will expand its Salesforce capabilities and services offered.

The total amount of the ten (10) contracts is not to exceed \$10,000,000, and shall become effective upon Governor and Executive Council approval through December 31, 2023.

"Innovative Technologies Today for New Hampshire's Tomorrow"

Denis Goulet
Commissioner

STATE OF NEW HAMPSHIRE
DEPARTMENT OF INFORMATION TECHNOLOGY
27 Hazen Dr., Concord, NH 03301
Fax: 603-271-1516 TDD Access: 1-800-735-2964
www.nh.gov/doit

A copy of this letter should accompany the Department of Administrative Services' submission to the Governor and Executive Council for approval.

Sincerely,



Denis Goulet

DG/ik
DoIT #2021-081

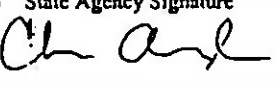
cc: Paul Rhodes, DAS

Notice: This agreement and all of its attachments shall become public upon submission to Governor and Executive Council for approval. Any information that is private, confidential or proprietary must be clearly identified to the agency and agreed to in writing prior to signing the contract:

AGREEMENT

The State of New Hampshire and the Contractor hereby mutually agree as follows:

GENERAL PROVISIONS**1. IDENTIFICATION.**

1.1 State Agency Name Department of Administrative Services		1.2 State Agency Address State House Annex 25 Capitol Street Concord, NH 03301	
1.3 Contractor Name Slalom, LLC		1.4 Contractor Address 399 Boylston Street Suite 1000 Boston, MA 02116	
1.5 Contractor Phone Number 617-640-0092	1.6 Account Number Various	1.7 Completion Date December 31, 2023	1.8 Price Limitation \$10,000,000.00
1.9 Contracting Officer for State Agency Paul Rhodes, Purchasing Manager		1.10 State Agency Telephone Number 603-271-3350	
1.11 Contractor Signature  Russell Norris (Jul 21, 2021 11:45 EDT)		1.12 Name and Title of Contractor Signatory Russell Norris General Manager	
1.13 State Agency Signature  Date: 8/23/21		1.14 Name and Title of State Agency Signatory Charles M. Arlinghaus, Commissioner	
1.15 Approval by the N.H. Department of Administration, Division of Personnel (if applicable) By: _____ Director, On: _____			
1.16 Approval by the Attorney General (Form, Substance and Execution) (if applicable) By:  On: 8/30/2021			
1.17 Approval by the Governor and Executive Council (if applicable) G&C Item number: _____ G&C Meeting Date: _____			

2. SERVICES TO BE PERFORMED. The State of New Hampshire, acting through the agency identified in block 1.1 ("State"), engages contractor identified in block 1.3 ("Contractor") to perform, and the Contractor shall perform, the work or sale of goods, or both, identified and more particularly described in the attached EXHIBIT B which is incorporated herein by reference ("Services").

3. EFFECTIVE DATE/COMPLETION OF SERVICES.

3.1 Notwithstanding any provision of this Agreement to the contrary, and subject to the approval of the Governor and Executive Council of the State of New Hampshire, if applicable, this Agreement, and all obligations of the parties hereunder, shall become effective on the date the Governor and Executive Council approve this Agreement as indicated in block 1.17, unless no such approval is required, in which case the Agreement shall become effective on the date the Agreement is signed by the State Agency as shown in block 1.13 ("Effective Date").

3.2 If the Contractor commences the Services prior to the Effective Date, all Services performed by the Contractor prior to the Effective Date shall be performed at the sole risk of the Contractor, and in the event that this Agreement does not become effective, the State shall have no liability to the Contractor, including without limitation, any obligation to pay the Contractor for any costs incurred or Services performed. Contractor must complete all Services by the Completion Date specified in block 1.7.

4. CONDITIONAL NATURE OF AGREEMENT.

Notwithstanding any provision of this Agreement to the contrary, all obligations of the State hereunder, including, without limitation, the continuance of payments hereunder, are contingent upon the availability and continued appropriation of funds affected by any state or federal legislative or executive action that reduces, eliminates or otherwise modifies the appropriation or availability of funding for this Agreement and the Scope for Services provided in EXHIBIT B, in whole or in part. In no event shall the State be liable for any payments hereunder in excess of such available appropriated funds. In the event of a reduction or termination of appropriated funds, the State shall have the right to withhold payment until such funds become available, if ever, and shall have the right to reduce or terminate the Services under this Agreement immediately upon giving the Contractor notice of such reduction or termination. The State shall not be required to transfer funds from any other account or source to the Account identified in block 1.6 in the event funds in that Account are reduced or unavailable.

5. CONTRACT PRICE/PRICE LIMITATION/ PAYMENT.

5.1 The contract price, method of payment, and terms of payment are identified and more particularly described in EXHIBIT C which is incorporated herein by reference.

5.2 The payment by the State of the contract price shall be the only and the complete reimbursement to the Contractor for all expenses, of whatever nature incurred by the Contractor in the performance hereof, and shall be the only and the complete

compensation to the Contractor for the Services. The State shall have no liability to the Contractor other than the contract price.

5.3 The State reserves the right to offset from any amounts otherwise payable to the Contractor under this Agreement those liquidated amounts required or permitted by N.H. RSA 80:7 through RSA 80:7-c or any other provision of law.

5.4 Notwithstanding any provision in this Agreement to the contrary, and notwithstanding unexpected circumstances, in no event shall the total of all payments authorized, or actually made hereunder, exceed the Price Limitation set forth in block 1.8.

6. COMPLIANCE BY CONTRACTOR WITH LAWS AND REGULATIONS/ EQUAL EMPLOYMENT OPPORTUNITY.

6.1 In connection with the performance of the Services, the Contractor shall comply with all applicable statutes, laws, regulations, and orders of federal, state, county or municipal authorities which impose any obligation or duty upon the Contractor, including, but not limited to, civil rights and equal employment opportunity laws. In addition, if this Agreement is funded in any part by monies of the United States, the Contractor shall comply with all federal executive orders, rules, regulations and statutes, and with any rules, regulations and guidelines as the State or the United States issue to implement these regulations. The Contractor shall also comply with all applicable intellectual property laws.

6.2 During the term of this Agreement, the Contractor shall not discriminate against employees or applicants for employment because of race, color, religion, creed, age, sex, handicap, sexual orientation, or national origin and will take affirmative action to prevent such discrimination.

6.3. The Contractor agrees to permit the State or United States access to any of the Contractor's books, records and accounts for the purpose of ascertaining compliance with all rules, regulations and orders, and the covenants, terms and conditions of this Agreement.

7. PERSONNEL.

7.1 The Contractor shall at its own expense provide all personnel necessary to perform the Services. The Contractor warrants that all personnel engaged in the Services shall be qualified to perform the Services, and shall be properly licensed and otherwise authorized to do so under all applicable laws.

7.2 Unless otherwise authorized in writing, during the term of this Agreement, and for a period of six (6) months after the Completion Date in block 1.7, the Contractor shall not hire, and shall not permit any subcontractor or other person, firm or corporation with whom it is engaged in a combined effort to perform the Services to hire, any person who is a State employee or official, who is materially involved in the procurement, administration or performance of this Agreement. This provision shall survive termination of this Agreement.

7.3 The Contracting Officer specified in block 1.9, or his or her successor, shall be the State's representative. In the event of any dispute concerning the interpretation of this Agreement, the Contracting Officer's decision shall be final for the State.

8. EVENT OF DEFAULT/REMEDIES.

8.1 Any one or more of the following acts or omissions of the Contractor shall constitute an event of default hereunder ("Event of Default"):

8.1.1 failure to perform the Services satisfactorily or on schedule;

8.1.2 failure to submit any report required hereunder; and/or

8.1.3 failure to perform any other covenant, term or condition of this Agreement.

8.2 Upon the occurrence of any Event of Default, the State may take any one, or more, or all, of the following actions:

8.2.1 give the Contractor a written notice specifying the Event of Default and requiring it to be remedied within, in the absence of a greater or lesser specification of time, thirty (30) days from the date of the notice; and if the Event of Default is not timely cured, terminate this Agreement, effective two (2) days after giving the Contractor notice of termination;

8.2.2 give the Contractor a written notice specifying the Event of Default and suspending all payments to be made under this Agreement and ordering that the portion of the contract price which would otherwise accrue to the Contractor during the period from the date of such notice until such time as the State determines that the Contractor has cured the Event of Default shall never be paid to the Contractor;

8.2.3 give the Contractor a written notice specifying the Event of Default and set off against any other obligations the State may owe to the Contractor any damages the State suffers by reason of any Event of Default; and/or

8.2.4 give the Contractor a written notice specifying the Event of Default, treat the Agreement as breached, terminate the Agreement and pursue any of its remedies at law or in equity, or both.

8.3. No failure by the State to enforce any provisions hereof after any Event of Default shall be deemed a waiver of its rights with regard to that Event of Default, or any subsequent Event of Default. No express failure to enforce any Event of Default shall be deemed a waiver of the right of the State to enforce each and all of the provisions hereof upon any further or other Event of Default on the part of the Contractor.

9. TERMINATION.

9.1 Notwithstanding paragraph 8, the State may, at its sole discretion, terminate the Agreement for any reason, in whole or in part, by thirty (30) days written notice to the Contractor that the State is exercising its option to terminate the Agreement.

9.2 In the event of an early termination of this Agreement for any reason other than the completion of the Services, the Contractor shall, at the State's discretion, deliver to the Contracting Officer, not later than fifteen (15) days after the date of termination, a report ("Termination Report") describing in detail all Services performed, and the contract price earned, to and including the date of termination. The form, subject matter, content, and number of copies of the Termination Report shall be identical to those of any Final Report described in the attached EXHIBIT B. In addition, at the State's discretion, the Contractor shall, within 15 days of notice of early termination, develop and submit to the State a Transition Plan for services under the Agreement.

10. DATA/ACCESS/CONFIDENTIALITY/PRESERVATION.

10.1 As used in this Agreement, the word "data" shall mean all information and things developed or obtained during the performance of, or acquired or developed by reason of, this Agreement, including, but not limited to, all studies, reports, files, formulae, surveys, maps, charts, sound recordings, video recordings, pictorial reproductions, drawings, analyses, graphic representations, computer programs, computer printouts, notes, letters, memoranda, papers, and documents, all whether finished or unfinished.

10.2 All data and any property which has been received from the State or purchased with funds provided for that purpose under this Agreement, shall be the property of the State, and shall be returned to the State upon demand or upon termination of this Agreement for any reason.

10.3 Confidentiality of data shall be governed by N.H. RSA chapter 91-A or other existing law. Disclosure of data requires prior written approval of the State.

11. CONTRACTOR'S RELATION TO THE STATE. In the performance of this Agreement the Contractor is in all respects an independent contractor, and is neither an agent nor an employee of the State. Neither the Contractor nor any of its officers, employees, agents or members shall have authority to bind the State or receive any benefits, workers' compensation or other emoluments provided by the State to its employees.

12. ASSIGNMENT/DELEGATION/SUBCONTRACTS.

12.1 The Contractor shall not assign, or otherwise transfer any interest in this Agreement without the prior written notice, which shall be provided to the State at least fifteen (15) days prior to the assignment, and a written consent of the State. For purposes of this paragraph, a Change of Control shall constitute assignment. "Change of Control" means (a) merger, consolidation, or a transaction or series of related transactions in which a third party, together with its affiliates, becomes the direct or indirect owner of fifty percent (50%) or more of the voting shares or similar equity interests, or combined voting power of the Contractor, or (b) the sale of all or substantially all of the assets of the Contractor.

12.2 None of the Services shall be subcontracted by the Contractor without prior written notice and consent of the State. The State is entitled to copies of all subcontracts and assignment agreements and shall not be bound by any provisions contained in a subcontract or an assignment agreement to which it is not a party.

13. INDEMNIFICATION. Unless otherwise exempted by law, the Contractor shall indemnify and hold harmless the State, its officers and employees, from and against any and all claims, liabilities and costs for any personal injury or property damages, patent or copyright infringement, or other claims asserted against the State, its officers or employees, which arise out of (or which may be claimed to arise out of) the acts or omission of the Contractor, or subcontractors, including but not limited to the negligence, reckless or intentional conduct. The State shall not be liable for any costs incurred by the Contractor arising under

this paragraph 13. Notwithstanding the foregoing, nothing herein contained shall be deemed to constitute a waiver of the sovereign immunity of the State, which immunity is hereby reserved to the State. This covenant in paragraph 13 shall survive the termination of this Agreement.

14. INSURANCE.

14.1 The Contractor shall, at its sole expense, obtain and continuously maintain in force, and shall require any subcontractor or assignee to obtain and maintain in force, the following insurance:

14.1.1 commercial general liability insurance against all claims of bodily injury, death or property damage, in amounts of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate or excess; and

14.1.2 special cause of loss coverage form covering all property subject to subparagraph 10.2 herein, in an amount not less than 80% of the whole replacement value of the property.

14.2 The policies described in subparagraph 14.1 herein shall be on policy forms and endorsements approved for use in the State of New Hampshire by the N.H. Department of Insurance, and issued by insurers licensed in the State of New Hampshire.

14.3 The Contractor shall furnish to the Contracting Officer identified in block 1.9, or his or her successor, a certificate(s) of insurance for all insurance required under this Agreement. Contractor shall also furnish to the Contracting Officer identified in block 1.9, or his or her successor, certificate(s) of insurance for all renewal(s) of insurance required under this Agreement no later than ten (10) days prior to the expiration date of each insurance policy. The certificate(s) of insurance and any renewals thereof shall be attached and are incorporated herein by reference.

15. WORKERS' COMPENSATION.

15.1 By signing this agreement, the Contractor agrees, certifies and warrants that the Contractor is in compliance with or exempt from, the requirements of N.H. RSA chapter 281-A ("Workers' Compensation").

15.2 To the extent the Contractor is subject to the requirements of N.H. RSA chapter 281-A, Contractor shall maintain, and require any subcontractor or assignee to secure and maintain, payment of Workers' Compensation in connection with activities which the person proposes to undertake pursuant to this Agreement. The Contractor shall furnish the Contracting Officer identified in block 1.9, or his or her successor, proof of Workers' Compensation in the manner described in N.H. RSA chapter 281-A and any applicable renewal(s) thereof, which shall be attached and are incorporated herein by reference. The State shall not be responsible for payment of any Workers' Compensation premiums or for any other claim or benefit for Contractor, or any subcontractor or employee of Contractor, which might arise under applicable State of New Hampshire Workers' Compensation laws in connection with the performance of the Services under this Agreement.

16. NOTICE. Any notice by a party hereto to the other party shall be deemed to have been duly delivered or given at the time of mailing by certified mail, postage prepaid, in a United States Post Office addressed to the parties at the addresses given in blocks 1.2 and 1.4, herein.

17. AMENDMENT. This Agreement may be amended, waived or discharged only by an instrument in writing signed by the parties hereto and only after approval of such amendment, waiver or discharge by the Governor and Executive Council of the State of New Hampshire unless no such approval is required under the circumstances pursuant to State law, rule or policy.

18. CHOICE OF LAW AND FORUM. This Agreement shall be governed, interpreted and construed in accordance with the laws of the State of New Hampshire, and is binding upon and inures to the benefit of the parties and their respective successors and assigns. The wording used in this Agreement is the wording chosen by the parties to express their mutual intent, and no rule of construction shall be applied against or in favor of any party. Any actions arising out of this Agreement shall be brought and maintained in New Hampshire Superior Court which shall have exclusive jurisdiction thereof.

19. CONFLICTING TERMS. In the event of a conflict between the terms of this P-37 form (as modified in EXHIBIT A) and/or attachments and amendment thereof, the terms of the P-37 (as modified in EXHIBIT A) shall control.

20. THIRD PARTIES. The parties hereto do not intend to benefit any third parties and this Agreement shall not be construed to confer any such benefit.

21. HEADINGS. The headings throughout the Agreement are for reference purposes only; and the words contained therein shall in no way be held to explain, modify, amplify or aid in the interpretation, construction or meaning of the provisions of this Agreement.

22. SPECIAL PROVISIONS. Additional or modifying provisions set forth in the attached EXHIBIT A are incorporated herein by reference.

23. SEVERABILITY. In the event any of the provisions of this Agreement are held by a court of competent jurisdiction to be contrary to any state or federal law, the remaining provisions of this Agreement will remain in full force and effect.

24. ENTIRE AGREEMENT. This Agreement, which may be executed in a number of counterparts, each of which shall be deemed an original, constitutes the entire agreement and understanding between the parties, and supersedes all prior agreements and understandings with respect to the subject matter hereof.

EXHIBIT A

SPECIAL PROVISIONS

1. Delete Section 13. INDEMNIFICATION in its entirety and substitute with the following:

The Contractor shall defend, indemnify and hold harmless the State, its officers and employees, from and against any and all claims, liabilities and costs for any personal injury or property damages, patent or copyright infringement, or other claims asserted against the State, its officers or employees, which arise out of (or which may be claimed to arise out of) the acts or omission of the Contractor, or subcontractors, including but not limited to the negligence, reckless or intentional conduct. The State shall not be liable for any costs incurred by the Contractor arising under this paragraph.

The Contractor shall require any subcontractor, delegates, or transferees to agree in writing to defend, indemnify and hold harmless the State, its officers and employees from and against any and all losses suffered by the; State, its officers and employees, and any and all claims, liabilities or penalties asserted against the State, its officers and employees, by or on behalf of any person, on account of, based or resulting from, arising out of (or which may be claimed to arise out of) the acts or omissions of the subcontractor, delegate, or transferee.

Further, notwithstanding the foregoing, nothing herein contained shall be deemed to constitute a waiver of the sovereign immunity of the State, which immunity is hereby reserved to the State. This covenant shall survive the termination of this Agreement

**EXHIBIT B
SCOPE OF SERVICES**

1. INTRODUCTION

This Master Agreement is entered into by and between Stalom, LLC (hereinafter referred to as the "Contractor") and the State of New Hampshire (hereinafter referred to as the "State"). The Contractor hereby agrees to provide the State and its agencies with for Salesforce Professional Services in accordance to this Agreement and the terms of Request for Quotes (RFQ)/Statements of Work (SOW) to this Agreement.

2. CONTRACT DOCUMENTS

This Contract consists of the following documents ("Contract Documents"):

- a. State of New Hampshire Terms and Conditions, General Provisions Form P-37
- b. EXHIBIT A Special Provisions
- c. EXHIBIT B Scope of Services
- d. EXHIBIT C Method of Payment
- e. EXHIBIT D RFP 2425-21
- f. EXHIBIT E RFQ/SOW

In the event of any conflict among the terms or provisions of the documents listed above, the following order of priority shall indicate which documents control: (1) Form Number P-37, as modified in Exhibit A, Special Provisions, (2) EXHIBIT B "Scope of Services," (3) EXHIBIT C "Method of Payment," (4) RFQ/SOW Worksheet, and (5) EXHIBIT D "RFP 2425-21."

All RFQ/SOW and Purchase Orders shall be subject solely to the terms of this Contract. In the event of any conflict among the terms or provisions of this Contract and the SOW and Purchase Orders, the terms of this Contract must take precedent.

3. TERM OF CONTRACT

The term of this Contract shall commence upon the approval by the Governor and Executive Council and shall continue thereafter through December 31, 2023, a period of approximately two and one-half (2.5) years, unless extended for additional terms.

The Contract may be extended for five (5) additional one-year extension terms thereafter upon the same terms, conditions and pricing structure upon the approval of the Governor and Executive Council.

The maximum term of the Contract (including all extensions) cannot exceed seven and one-half (7.5) years.

4. SCOPE OF WORK

All SOWs that are negotiated between the Parties shall be in writing and executed by both Parties and shall be attached hereto as supplemental Exhibits, and shall be incorporated into, and governed by, this Agreement. A standard template to request a quote is attached (Exhibit E). Contractor must be capable of providing information technology professional services for implementing Salesforce solutions.

Contractor will receive RFQs/SOW from the Department of Administrative Services with a Salesforce Professional Services Scope of Work. Each Scope of Work will detail various requirements related to the planning and implementation of new projects. Each Scope of Work may request Salesforce implementation and experience in varying functional areas or require mandatory expertise. Requests for Services or Deliverables under the Contract will be submitted on behalf of State Agencies in the form of an RFQ/SOW to all contractors. An RFQ/SOW shall not constitute a binding order until a Purchase Order and RFQ/SOW have been approved per the requirements of the Contract.

In cases where special licenses, accreditations or certifications are required by the State, federal or local law or regulation to perform Services of specified job descriptions or RFQ/SOW, Contractor shall provide copies of such license, accreditation or certification within five (5) business days upon award when requested by the State.

Individual RFQs/SOW may include additional contractual requirements, certifications, or approvals that must be satisfied at the time the Purchase Order (PO) is placed or upon delivery. Any federal requirements or additional funding requirements will be defined by the State in the RFQ/SOW and incorporated in Purchase Orders (PO).

I. STANDARDS FOR FUTURE PROJECTS

I. USE OF CONTRACTOR SOLUTIONS

- When awarded a project through the RFQ/SOW process, Contractor will provide the services as specified within the RFQ/SOW.
- Contractor shall explicitly state what Salesforce licenses are required as well as any third party applications when responding to a RFQ/SOW.
- Each RFQ/SOW may include requirements about the System Integrator's (SI) experience in implementing a similar solution. Experience shall include requirements that include but are not limited to, how many solutions of a similar nature are implemented and operational, the size and complexity of the project, and any experience with statutory, regulatory, or industry standards. The specific Contractor proposed functionality must be described.

II. SECURITY AND TESTING

I. APPLICATION SECURITY

Contractor shall:

- Develop Software applications based on industry best practices and incorporating information security throughout the Software development life cycle;
- Perform a Code Review prior to release of the application to the State to move it into production. The code Review may be done in a manner mutually agreeable to the Contractor and the State. Copies of the final, remediated results shall be provided to the State for Review and audit purposes;
- Follow Change Control Procedures (CCP) relative to release of code; and
- Develop applications following security-coding guidelines as set forth by organizations such as, but not limited to Open Web Application Security Project (OWASP) Top 10, SANS Common Weakness Enumeration (CWE) Top 25 or CERT Secure Coding.

II. TEST PLANNING AND PRÉPARATION

Contractor shall meet the State's testing and acceptance requirements. All Testing and Acceptance addressed herein shall apply to testing the System. This shall include planning, test scenario development, Data and System preparation for testing, and execution of Unit Testing, System integration testing, conversion/migration testing, Installation testing, performance, and stress testing, Security Review and testing, and support of the State during user Acceptance Testing (UAT).

Contractor must disclose in their RFQ/SOW responses the scheduling assumptions used in regard to the Using Agency's resource efforts during testing.

Contractor shall certify, in writing, that the Contractor's own staff has successfully executed all prerequisite testing, along with reporting the actual testing results.

The State will commence its testing within five (5) business days of receiving Certification from the Contractor that the State's personnel have been trained and the System is installed, configured, complete, and ready for State testing. The testing will be conducted by the State in an environment independent from the Contractor's development environment. Contractor must assist the State with testing in accordance with the Test Plan and the Work Plan, utilizing test and live Data to validate reports, and conduct stress and performance testing.

III. TESTING

Testing begins upon completion of the Software configuration as required and user training according to the Work Plan. Testing ends upon issuance of a letter of UAT Acceptance by the State.

Contractor shall adhere to the State's standard methodology described in Table III-C: State Recommended Testing Methodology.

Table III-C: State Recommended Testing Methodology
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Unit Testing	Application components are tested on an individual basis to verify that the inputs, outputs, and processing logic of each application component functions without errors. Unit Testing is performed in either the development environment or a testing environment. The goal is to find errors in the smallest unit of Software. If successful, subsequent integration testing should only reveal errors related to the integration between application components.
System Integration Testing	a. Validates the integration between the individual unit application components and verifies that the new System meets defined requirements and supports execution of interfaces and business processes. The Systems Integration Test is performed in a test environment. b. Emphasizes end-to-end business processes and the flow of information across applications. It includes all key business processes and interfaces being implemented, confirms Data transfers with external parties, and includes the transmission or printing of all electronic and paper documents. c. The State will conduct System Integration Testing, utilizing scripts developed, as identified in the Test Plan, to validate the functionality of the System and its interfaces. The State will also use System Integration Testing to validate modifications, fixes and other System interactions with the Contractor supplied Software Solution.
Conversion /Migration Validation Testing	The Conversion/Migration Validation Testing should replicate the entire flow of the converted Data through the Software Solution. As the Software Solution is interfaced to legacy or third-party applications, the testing verifies that the resulting converted legacy Data performs correctly.
Installation Testing	Application components are installed in the System test environment to test the installation routines and are refined for the eventual production environment. This activity serves as a dry run of the installation steps in preparation for configuring the production System.

User Acceptance Testing (UAT)	The User Acceptance Test (UAT) is a Verification process performed in a copy of the production environment. The User Acceptance Test verifies System functionality against predefined Acceptance criteria that support the successful execution of approved business processes. a. The Contractor's Project Manager must certify in writing, that the Contractor's own staff has successfully executed all prerequisite Contractor testing, along with reporting the actual testing results prior to the start of any testing executed by State staff. b. The State will be presented with a State approved Test Plan, test scenarios, test cases, test scripts, test Data, and expected results, as well as written Certification of the Contractor's having completed the prerequisite tests, prior to the State staff involvement in any testing activities. c. UAT will also serve as a performance and stress test of the System. It may cover any aspect of the new System, including administrative procedures such as backup and recovery. The results of the UAT provide evidence that the new System meets the User Acceptance criteria as defined in the Work Plan Upon successful conclusion of UAT and successful System deployment, the State will issue a letter of UAT Acceptance and the respective Warranty Period shall commence as described in Section 4.12 Warranty Period.
Regression Testing	As a result, of the user testing activities, problems will be identified that require correction. The State will notify the Contractor of the nature of the testing failures in writing. The Contractor will be required to perform additional testing activities in response to State and/or user problems identified from the testing results. Regression Testing means selective re-testing to detect faults introduced during the modification effort, both to verify that the modifications have not caused unintended adverse effects, and to verify that the modified and related (possibly affected) System components still meet their specified requirements. a. For each minor failure of an Acceptance Test, the Acceptance Period shall be extended by corresponding time defined in the Test Plan.

	b. The Contractor shall notify the State no later than five (5) business days from the Contractor's receipt of written notice of the test failure when the Contractor expects the corrections to be completed and ready for retesting by the State. The Contractor will have up to five (5) business days to make corrections to the problem unless specifically extended in writing by the State. c. When a programming change is made in response to a problem identified during user testing, a Regression Test Plan should be developed by the Contractor based on the understanding of the program and the change being made to the program. The Test Plan has two objectives: 1. Validate that the change/update has been properly incorporated into the program; and 2. Validate that there has been no unintended change to the other portions of the program. d. The Contractor shall: 1. Create a set of test conditions, test cases, and test data that will validate that the change has been incorporated correctly; 2. Create a set of test conditions, test cases, and test data that will validate that the unchanged portions of the program still operate correctly; and 3. Manage the entire cyclic process. e. The Contractor will be expected to execute the Regression Test, provide actual testing results, and certify its completion in writing to the State prior to passing the modified Software application to the users for retesting. In designing and conducting such Regression Testing, the Contractor will be required to assess the risks inherent to the modification being implemented and weigh those risks against the time and effort required for conducting the Regression Tests. In other words, the Contractor will be expected to design and conduct Regression Tests that will identify any unintended
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	consequences of the modification while taking into account Schedule and economic considerations.																
Security Review and Testing	IT Security involves all functions pertaining to the securing of State Data and Systems through the creation and definition of security policies, procedures and controls covering such areas as Identification, Authentication and non-repudiation. All components of the Software shall be Reviewed and tested to ensure they protect the State's hardware and Software and its related Data assets. <table border="1"> <tr> <th>Service Component</th><th>Defines the set of capabilities that:</th></tr> <tr> <td>Identification and Authentication</td><td>Supports obtaining information about those parties attempting to log onto a system or application for security purposes and the validation of users.</td></tr> <tr> <td>Access Control</td><td>Supports the management of permissions for logging onto a computer or network.</td></tr> <tr> <td>Encryption</td><td>Supports the encoding of Data for security purposes</td></tr> <tr> <td>Intrusion Detection</td><td>Supports the detection of illegal entrance into a computer system.</td></tr> <tr> <td>Verification</td><td>Supports the confirmation of authority to enter a computer system, application or network.</td></tr> <tr> <td>Digital Signature</td><td>Guarantees the unaltered state of a file.</td></tr> <tr> <td>User Management</td><td>Supports the administration of computer, application and network accounts within an organization.</td></tr> </table>	Service Component	Defines the set of capabilities that:	Identification and Authentication	Supports obtaining information about those parties attempting to log onto a system or application for security purposes and the validation of users.	Access Control	Supports the management of permissions for logging onto a computer or network.	Encryption	Supports the encoding of Data for security purposes	Intrusion Detection	Supports the detection of illegal entrance into a computer system.	Verification	Supports the confirmation of authority to enter a computer system, application or network.	Digital Signature	Guarantees the unaltered state of a file.	User Management	Supports the administration of computer, application and network accounts within an organization.
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	Role/Privilege Management	Supports the granting of abilities to users or groups of users of a computer, application or network.
	Audit Trail Capture and Analysis	Supports the identification and monitoring of activities within an application or system.
	Input Validation	Ensures the application is protected from buffer overflow, cross-site scripting, SQL injection, and unauthorized access of files and/or directories on the server.
Prior to any System being moved into production, Contractor shall provide results of all security testing to the Department of Information Technology for Review and Acceptance. All Software and hardware shall be free of malicious code (malware).		

III. GENERAL REQUIREMENTS

I. CONTRACTOR STAFF

The Contractor's Project Manager requires approval of the State prior to award of any RFQ/SOW. The State's approval process may include, without limitation, at the State's discretion, review of the proposed Project Manager's resume, qualifications, references and background checks, and an interview. The Contractor's Project Manager must be qualified to perform the obligations required of the position under the Contract, have full authority to make binding decisions, and shall function as the Contractor's representative for all administrative and management matters. The Project Manager must be available to promptly respond during Normal Working Hours within two (2) hours to inquiries from the State, and be at the site as needed.

The Contractor shall not change key staff and Project Manager commitments (collectively referred to as "Project Staff") unless such replacement is necessary due to sickness, death, termination of employment, or unpaid leave of absence. Any such changes to the Contractor's Project Staff shall require the prior written approval of the State. Replacement Project Staff shall have comparable or greater skills with regard to performance of the Project as the staff being replaced and be subject to the provisions of this Contract.

The State may conduct reference and background checks on the Contractor's Project Staff. The State shall maintain the confidentiality of reference and background screening results. The State reserves the right to reject the Contractor's Project Staff as a result of such reference and background checks. The State also reserves the right to require removal or reassignment of the Contractor's Key Project Staff found unacceptable to the State.

Notwithstanding anything to the contrary, the State shall have the option to terminate the Contract, at its discretion, if it is dissatisfied with the Contractor's replacement Project Staff.

The Contractor shall not allow its personnel or subcontractors to store State data on portable devices, including personal computers, except as specified and allowed by the Contract, and then only on devices that are used and kept at its data centers within the Continental United States. The Contractor shall permit its personnel and contractors to access State data remotely only to provide technical support and as specified or required by the contract.

II. Program Support Roles

A. PROJECT MANAGER

The Contractor must have, maintain for the duration of this Agreement and engage Project Manager in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Project Manager shall have at least 5+ years of Program/Project Management experience managing a contract and IT project team within the Public Sector or Government environments.
- Strong ability to establish and maintain effective working relationships with associates, subordinates, public officials and other professionals. A very strong verbal, written and presentation skills and an ability to express ideas clearly and concisely both orally and in all forms of communication.
- Certification in the field of Project Management.
- Understanding of Agency business strategies and oversees short and long-term Salesforce strategies for IT infrastructure, operations and Agency IT Plan (AITP), and works with project team to define objectives, research IT requirements, provide cost benefit analysis and directs projects towards the best Salesforce solution.
- Provides input into the design and implementation of project management/infrastructure processes where modifications are beneficial to support project outcomes. This may include items such as deliverable templates, invoice processing, time approval, or sub-team reporting where such infrastructure is not existent or not meeting the needs of the project.
- Demonstrates technical and judgmental skills required to perform project management.
- Provides direction and support for assigned projects (project intake/prioritizations, and workflow and document management) to ensure timely and efficient completion of tasks.
- Assumes responsibility for projects and assigned staff and consultants; including delegation and scheduling of work across agencies and provides timely project progress reviews and feedback to senior leadership in DoIT, Project participants and sponsors.
- Maintain continuous and effective oversight of analysis and coordination efforts, including business analysts to support project mission and objectives.
- Leads analysis as well as project management tasks and activities as needed to move project efforts towards completion.
- Maintains project plan monitoring, control and updates as authorized and approved by DoIT management.

- Participates in intra- and inter- agency discussions, requiring logical and technological expertise, particularly to share and document information and coordinate with project stakeholders from DoIT and other agencies.
- Continually seeks to improve practices to add quality and value in support of the intended assigned project missions and goals.
- Facilitate ongoing status reporting and conduct periodic project reviews.
- Ability to perform financial management duties – producing bills/invoices and tracking the project budget.
- Maintains a Program Management Schedule that tracks upcoming work, major accomplishments, and risks.
- Ability to manage project staff and ensure that they meet approved project deadlines.

B. Scrum Master

The Contractor must have, maintain for the duration of this Agreement and engage Scrum Master in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Scrum Master shall have at least 5+ years of experience a Salesforce project team within the Public Sector or Governmental environments.
- At least 1 of the following certifications: Certified Scrum Master, PMI Agile Certified Practitioner, Professional Scrum Master II Certification.
- Experience with facilitating Scrum Events and Activities.
- Experience with ensuring the project team and government staff understand the scrum or agile framework that will be used for sprints and releases.
- Experience with leading Scrum or Scrum Sessions.
- Experience with ensuring that the Sprint Stays aligned to Sprint Goals and meets the definition of done.
- Experience with tracking and communicating issues that are discussed during the Daily Scrums or Scrum of Scrum sessions.
- Experience with facilitating Sprint Retrospective and identify areas of improvement.
- Experience with supporting the development team in creating user stories for each sprint.
- Experience in application design and development as well a systems maintenance and operations of a large-scale IT system.
- Experience with maintaining the Scrum Task board or Kanban Board for the development team and government to review the latest status of the sprint.

C. Salesforce Administrator

The Contractor must have, maintain for the duration of this Agreement and engage Salesforce Administrator in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Salesforce Administrator shall have at least 3+ years of experience a Salesforce project team within the Public Sector or Governmental environments.
- Must have Salesforce Certified Administrator certification.
- Experience with setting up organization profiles, configuring User interfaces and configure search settings.

- Experience with creating and maintaining an enterprise contact list within Salesforce.
- Experience with setting up and managing user profiles, troubleshooting user login issues.
- Experience with deploying lift and shift Salesforce solutions.
- Experience with managing Security and data access based on: restricting logins, determining object access, establish record access controls, manage record access with role hierarchy, deal with record access exceptions, and manage field-level security.
- Experience with customizing Salesforce solutions by creating new custom fields, developing picklists & lookups, establishing page layouts, create record types while maintaining data quality.
- Experience with managing Sales force data based on: importing new records using the import wizards, updating existing records, mass transfer of records between users, cleaning of records/data integrity, backing up data, and maintaining a data dictionary.
- Experience with demonstrating the ability to automate email template responses, workflows, process builder, and establish rules within Salesforces capabilities.
- Experience with developing reports and dashboards within Salesforce based on the following: running and modifying reports, creating new reports, building dashboards using data visualization tools, and exporting data from reports.
- Must have strong business analysis and functional experience, including requirements gathering, creating/deploying solutions to end users, and managing User Acceptance Testing (UAT)/deployment process.
- Experience with the following: deploying Salesforce's solutions within a Government Cloud environment, knowledge (and experience) with Transport Layer Security (TLS) and Secure Sockets Layer (SSL), Salesforce Apex, Salesforce Object Query Language SOQL, Chatter, Salesforce's Lightning Component, VisualForce, Mulesoft, DocGen(Nintex), DevOps and Continuous Integration Tools, GitHub or similar tools.
- Experience with developing the following: Sales force intake solutions, Salesforce Investigation solutions, Salesforce Assessment solutions, Salesforce Service Planning Solutions, Case Management Solutions, Salesforce Reporting solutions, Salesforce Resource Management Solutions, Salesforce Financial Management Solutions, and experience with designing Salesforce UI and UX.

D. Salesforce Platform Developer

The Contractor must have, maintain for the duration of this Agreement and engage as a Salesforce Administrator in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Salesforce Developer shall have at least 3+ years of Salesforce Platform Developer experience with a Salesforce project team within the Public Sector or Governmental environments.
- Must have at least one of the following certifications: Salesforce Platform Certified Developer I, Salesforce Platform Developer II, or Salesforce Platform App Builder.

- Experience with product development life cycle and software testing, which includes creating unit test cases establishing unit testing protocols and appropriate testing environments, coordinate and execute software testing.
- Experience with deploying lift and shift Salesforce solutions.
- Ability to design, code, test, debug, package and deploy quality scalable and well-documented solutions on the Salesforce solutions.
- Experience with deploying Salesforce's solutions within a Government Cloud environment.
- Successfully document/maintain documentation on application code, application use and flow, and training materials.
- Experience with demonstrating the ability to automate email template responses, workflows, process builder, and establish rules within Salesforce capabilities.
- Experience with: Salesforce design/development, DevOps and Continuous Integration Tools, Salesforce Apex, developing Salesforce mobile solutions, MuleSoft and API programming, Chatter, VisualForce, Salesforce's Lightning Component, JavaScript, C3 or C++, SQL or Data Manipulation Language (DML), Salesforce Object Query Language (SOQL), GitHub or similar tools and code versioning best practices, designing Salesforce UI and UX, and DocGen (Nintex).
- Experience with developing: Salesforce intake solutions, Salesforce Investigation solutions, Salesforce Assessment solutions, Salesforce Service Planning solutions, Salesforce Case Management solutions, Salesforce Reporting solutions, Salesforce Resource Management solutions, and Salesforce Financial Management solutions.

E. Salesforce Technical Architect

The Contractor must have, maintain for the duration of this Agreement and engage as a Technical Architect in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Technical Architect shall have at least 5+ years of Salesforce Technical Architecture experience with a Salesforce project team within the Public Sector or Governmental environments.
- Must have the at least one of the following certifications: Salesforce Certified Application Architect, Salesforce Certified System Architect, or Salesforce Certified Technical Architect.
- Experience with architecting solutions that address security complexities, DevOps, application design/development, and capabilities on the Lightning Platform as part of a functional security model.
- Experience with identifying development-related risks, considerations, and limits for the platform across the architecture.
- Experience with deploying lift and shift Salesforce solutions.
- Understanding of data migration considerations, design trade-offs, and common ETL tools.
- Ability to document and maintain current As-Is and To-Be Salesforce Solutions' Architecture for government review.
- Ability to discuss and demonstrate all aspects of the Salesforce platform, including but not limited to business processes, hosting infrastructure, security,

integration to other IT systems across the State of New Hampshire's IT Enterprise.

- Experience with Service Oriented Architecture (SOA).
- Understanding of systems architecture and ability to design scalable performance-driven solutions.
- Experience with Salesforce Apex.
- Experience with VisualForce.
- Experience with Salesforce's Lightning Component.
- Experience with JavaScript.
- Experience with deploying Salesforce's solutions within a Government Cloud environment.
- Must have 3+ years of experience with GitHub or similar tools and code versioning best practices.
- Strong knowledge of the SDLC framework.
- Experience with DevOps and Continuous Integration Tools e.g. (Jenkins).
- Experience with MuleSoft or similar tools and API programming.
- Experience with Single Sign-on (SSO) and Security Assertion Markup Language (SAML)
- Experience and knowledge with Transport Layer Security (TLS) and Secure Sockets Layer (SSL).
- Experience with DocGen (Nintex)
- Experience with developing: Salesforce Intake solutions, Salesforce Investigation solutions, Salesforce Assessment solutions, Salesforce Service Planning solutions, Salesforce Case Management solutions, Salesforce Reporting solutions, Salesforce Resource Management solutions, Salesforce financial Management solutions, Salesforce Object Search Language (SOQL, and HTML.

F. Salesforce Data Architect

The Contractor must have, maintain for the duration of this Agreement and engage as a Salesforce Data Architect in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Technical Architect shall have at least 5+ years of Salesforce Data Architecture experience with a Salesforce project team within the Public Sector or Governmental environments.
- Experience in agile deliver.
- Must be a Salesforce certified Data Architecture and Management Designer.
- Experience with Data Modeling/Database Design.
- Experience with large scale Data Migration efforts and Indexing.
- Experience with performing Extract, Transform, Load (ETL) efforts.
- Must maintain data quality, a data dictionary, and As-Is and To-Be data models (logical and physical) for users to reference.
- Experience with Salesforce Shield for data security.
- Experience with Oracle database.
- Experience with leveraging Master Data Management (MDM) Tools.
- Experience with deploying Salesforce's solutions within a Government Cloud environment.
- Experience with Salesforce Apex.
- Experience with MuleSoft and API programming.

- Experience with VisualForce.
- Experience with Salesforce's Lightning Component.
- Experience with SQL or Data Manipulation Language (DML).
- Experience with Salesforce Object Query Language (SOQL).
- Experience with GitHub or similar tools and code versioning best practices.
- Experience with JavaScript.
- Experience with Tableau or similar data visualization tool.
- Experience with data analytics, data governance, and Business Intelligence solutions within Salesforce.
- Experience with DocGen (Nintex).
- Experience with developing Salesforce Intake solutions.
- Experience with developing Salesforce Investigation solutions.
- Experience with developing Salesforce Assessment
- Experience with developing Salesforce Service Planning solutions.
- Experience with developing Salesforce Case Management solutions.
- Experience with developing Salesforce Reporting solutions.
- Experience with developing Salesforce Resource Management solutions.
- Experience with developing Salesforce Financial Management solutions.
- Experience and knowledge with Transport Layer Security (TLS) and Secure Sockets Layer (SSL).

G. Salesforce Business Analyst

The Contractor must have, maintain for the duration of this Agreement and engage as a Salesforce Business Analyst in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Salesforce Business Analyst shall have at least 3+ years of Salesforce Business Analyst experience with a Salesforce project team within the Public Sector or Governmental environments.
- Must have the Salesforce Certified Administrator certification.
- Experience in agile delivery.
- Proficient in MS Excel, Word, PowerPoint and Visio.
- Experience with writing user stories, use case, business/IT requirements, and User Acceptance Testing documents.
- Experience with writing manuals and standard operating procedures.
- Experience with developing As-Is and To-Be process.
- Experience with Salesforce Solutions.
- Experience with Tableau or similar data visualization tools.
- Strong knowledge of the SDLC framework.
- Experience with facilitating requirements gathering sessions and problem solving.
- Experience developing reports that meeting Federal Standards.
- Experience with gathering requirements for DocGen (Nintex).
- Experience with gathering requirements for Salesforce Intake solutions.
- Experience with gathering requirements for Salesforce Investigation solutions.
- Experience with gathering requirements for Salesforce Assessment solutions.
- Experience with gathering requirements for Salesforce Service Planning solutions.
- Experience with gathering requirements for Salesforce Case Management solutions.

- Experience with gathering requirements for Salesforce Reporting solutions.
- Experience with gathering requirements for Salesforce Resource Management solutions.
- Experience with gathering requirements for Salesforce Financial management solutions.

H. Salesforce Training Consultant

The Contractor must have, maintain for the duration of this Agreement and engage as a Salesforce Training Consultant in any RFQ/SOW in this Agreement with the following minimum qualifications:

- Salesforce Training Consultant shall have Salesforce Training experience with a Salesforce project team within the Public Sector or Governmental environments.
- Must have Salesforce Certified Administrator certification.
- Proficient in MS Excel, Word, PowerPoint, and Visio.
- Experience with writing user guides and training manuals.
- Experience with Tableau or similar data visualization tool.
- Experience with Learning Management Solutions such as Moodle.
- Experience with training and teaching an audience on Salesforce solutions.
- Strong knowledge of the SDLC framework.
- Experience with gathering training requirements for future training sessions.
- Experience with facilitating requirements gathering sessions and problem solving.
- Experience with providing training on DocGen (Nintex).
- Experience with providing training on Salesforce Intake solutions.
- Experience with providing training on Salesforce Investigation solutions.
- Experience with providing training on Salesforce Assessment solutions.
- Experience with providing training on Salesforce Service Planning solutions.
- Experience with providing training on Salesforce Reporting solutions.
- Experience with providing training on Salesforce Resource Management solutions.

Experience with gathering requirements for Salesforce Financial management solutions.

IV. DELIVERABLES

The Contractor shall provide the State with the Deliverables and Services in accordance with the time frames in their response to RFQs/SOW. All Deliverables shall be subject to the State's Acceptance as set forth in Testing and Acceptance, herein. Upon its submission of a Deliverable, the Contractor shall represent that it has performed its obligations under the Contract and RFQ/SOW associated with the Deliverable.

By unconditionally accepting a Deliverable, the State reserves the right to reject any and all Deliverables in the event the State detects any Deficiency in the System, in whole or in part, through completion of all Acceptance Testing, including but not limited to, Software/System Acceptance Testing, and any extensions thereof.

For each denial of Acceptance, the Acceptance Period may be extended, at the option of the State, by the corresponding time required to correct the Deficiency, retest or Review.

I. WRITTEN DELIVERABLES REVIEW

The State will Review RFQ/SOW Written Deliverables for an Acceptance Period of five (5) business days after receiving written Certification from the Contractor that the Written Deliverable is final, complete, and ready for Review. The State will notify the Contractor in writing of its Acceptance or Non-Acceptance of a Deliverable by the end of the five (5) day Review Period. If any Deficiencies exist within RFQs/SOW, the State will notify the Contractor in writing of the Deficiency and the Contractor must correct the Deficiency within five (5) business days of receiving notice from the State at no charge to the State. Upon receipt of the corrected Deliverable, the State will have five (5) business days to Review the corrected Written Deliverable and notify the Contractor in writing of its Acceptance or rejection thereof.

II. SOFTWARE DELIVERABLES

Testing and Acceptance are completed based on the requirements defined herein.

III. NON-SOFTWARE DELIVERABLES REVIEW

The State will Review RFQ/SOW Non-Software Deliverables to determine whether any Deficiency exists and notify the Contractor in writing of its Acceptance or non-acceptance of the Non-Software Deliverable. The Contractor must correct the Deficiencies within five (5) business days; or within the period identified in the Work Plan, as applicable. Following correction of the Deficiency, the State will notify the Contractor in writing of its Acceptance or rejection of the Deliverable.

IV. SOFTWARE LICENSE GRANT

The Software License shall grant the State a worldwide, perpetual, irrevocable, non-exclusive, non-transferable, limited license to use the Software and its associated Documentation, subject to the terms of the Contract.

V. SOFTWARE AND DOCUMENTATION COPIES

The Contractor shall provide the State with a sufficient number of hard copy versions of the Software's associated Documentation and one (1) electronic version in Microsoft WORD and PDF format. The State shall have the right to copy the Software and its associated Documentation for its internal business needs. The State agrees to include copyright and proprietary notices provided to the State by the Contractor on such copies.

VI. RESTRICTIONS

Except as otherwise permitted within, the State agrees not to:

- Remove or modify any program markings or any notice of Contractor's proprietary rights;
- Make programs or materials available in any manner to any third party for use in the third party's business operations, except as permitted herein; or
- Cause or permit reverse engineering, disassembly or recompilation of the programs.

vii. TITLE

The Contractor must hold the right to allow the State to use the Software or hold all title, right, and interest (including all ownership and intellectual property rights) in the Software and its associated Documentation.

viii. REMEDIES

If the Contractor fails to correct a Deficiency within the period of time allotted by the State, the Contractor shall be deemed to have committed an Event of Default, pursuant Section 8, State of New Hampshire Terms and Conditions - P-37, General Provisions.

Notwithstanding any provision of the Contract, the State's option to terminate the Contract and pursue the stated remedies will remain in effect until the Contractor completes the Contract to the satisfaction of the State.

ix. SYSTEM ACCEPTANCE

Upon completion of the Warranty Period, the State will issue a Letter of Final System Acceptance.

x. WARRANTY PERIOD

The Warranty Period for each project will initially commence upon the State issuance of a Letter of Acceptance for UAT and will continue for ninety (90) days. If within the last thirty (30) calendar days of the Warranty Period, the System Software fails to operate as specified, the Warranty Period will cease, the Contractor will correct the Deficiency, and a new thirty (30) calendar day Warranty Period will begin. Any further Deficiencies with the Software must be corrected and run fault free for thirty (30) days.

The Contractor shall warrant that the System must operate to conform to the Specifications, terms, and requirements of the Contract and RFQ/SOW.

The Contractor shall warrant that the Software is properly functioning within the System, compliant with the requirements of the Contract, and will operate in accordance with the Specifications. Software shall be archived and or version controlled through the use of the State of New Hampshire's configuration management system.

The Contractor shall warrant that it has good title to, or the right to allow the State to use all Services, equipment, and Software provided under this Contract, and that such Services, equipment, and Software ("Material") do not violate or infringe any patent, trademark, copyright, trade name or other intellectual property rights or misappropriate a trade secret of any third party.

The Contractor shall warrant that the Software will not contain any viruses, destructive programming, or mechanisms designed to disrupt the performance of the Software in accordance with the Specifications.

The Contractor shall warrant that all System components, including any replacement or upgraded System Software components provided by the Contractor to correct Deficiencies or as an Enhancement, shall operate with the rest of the System without loss of any functionality.

The Contractor shall warrant that all Services provided under the Contract will be provided in a professional manner in accordance with industry standards and that Services will comply with performance standards.

xi. WARRANTY SERVICES

The Contractor shall agree to maintain, repair, and correct Deficiencies in the System Software, including but not limited to the individual modules or functions, during the Warranty Period at no additional cost to the State, in accordance with the Specifications and terms and requirements of the Contract, including without limitation, correcting all errors, and Defects and Deficiencies; eliminating viruses or destructive programming; and replacing incorrect, Defective or Deficient Software and Documentation.

Warranty Services shall include, without limitation, the following:

- Maintain the System Software in accordance with the Specifications, terms, and requirements of the Contract;
- Repair or replace the System Software or any portion thereof so that the System operates in accordance with the Specifications, terms, and requirements of the Contract;
- The Contractor shall have available to the State on-call telephone assistance, with issue tracking available to the State, twenty four (24) hours per day and seven (7) days a week with an email / telephone response within two (2) hours of request, with assistance response dependent upon issue severity;
- On-site additional Services within four (4) business hours of a request;
- Maintain a record of the activities related to Warranty Repair or maintenance activities performed for the State; and
- For all Warranty Services calls, the Contractor shall ensure the following information will be collected and maintained:
 - o Nature of the Deficiency;
 - o Current status of the Deficiency;
 - o Action plans, dates, and times;
 - o Expected and actual completion time;
 - o Deficiency resolution information;
 - o Resolved by;
 - o Identifying number i.e. work order number; and
 - o Issue identified by.
- The Contractor must work with the State to identify and troubleshoot potentially large-scale Software failures or Deficiencies by collecting the following information:
 - o Mean time between reported Deficiencies with the Software;
 - o Diagnosis of the root cause of the problem; and
 - o Identification of repeat calls or repeat Software problems.
- All Deficiencies found during the Warranty Period and all Deficiencies found with the Warranty Releases shall be corrected by the Contractor no later than five (5) business days, unless specifically extended in writing by the State, at no additional cost to the State.

If in the Event of Default, the Contractor fails to correct the Deficiency within the allotted period of time (see above), the State shall have the right, at its option: 1) to declare the Contractor in default, terminate the Contract, in whole or in part, without penalty or liability to the State; 2) to return the Contractor's product and receive a refund for all amounts paid to the Contractor, including but not limited to, applicable license fees within ninety (90) days of notification to the Contractor of the State's intent to request a refund; and 3) to pursue its remedies available at law or in equity.

Notwithstanding any provision of the Contract, the State's option to terminate the Contract and pursue the remedies above will remain in effect until satisfactory completion of the full Warranty Period.

xii. ONGOING SOFTWARE MAINTENANCE AND SUPPORT LEVELS

The Contractor shall maintain and support the System in all material respects as described in the applicable program Documentation after delivery and the Warranty Period of ninety (90) days through the completion of the Contract term.

The Contractor will not be responsible for maintenance or support for Software developed or modified by the State.

xiii. MAINTENANCE RELEASES

The Contractor shall make available to the State the latest program updates, general maintenance releases, selected functionality releases, patches, and Documentation that are generally offered to its customers, at no additional cost.

xiv. CONTRACTOR RESPONSIBILITY

The Contractor shall be responsible for performing on-site or remote technical support in accordance with the Contract Documents, including without limitation the requirements, terms, and conditions contained herein.

As part of the Software maintenance Agreement, ongoing Software maintenance and support levels, including all new Software releases, shall be responded to according to the following:

- Class A Deficiencies - The Contractor shall have available to the State on-call telephone assistance, with issue tracking available to the State, eight (8) hours per day and five (5) days a week with an email / telephone response within two (2) hours of request; or the Contractor shall provide support on-site or with remote diagnostic Services, within four (4) business hours of a request;
- Class B & C Deficiencies - The State shall notify the Contractor of such Deficiencies during regular business hours and the Contractor shall respond back within four (4) hours of notification of planned corrective action;

The Contractor shall repair or replace Software, and provide maintenance of the Software in accordance with the Specifications, Terms and Requirements of the Contract;

The Contractor shall maintain a record of the activities related to warranty repair or maintenance activities performed for the State;

For all maintenance Services calls, the Contractor shall ensure the following information will be collected and maintained:

- i. Nature of the Deficiency;
- ii. Current status of the Deficiency;
- iii. Action plans, dates, and times;
- iv. Expected and actual completion time;
- v. Deficiency resolution information;
- vi. Resolved by;
- vii. Identifying number i.e. work order number; and
- viii. Issue identified by.

The Contractor must work with the State to identify and troubleshoot potentially large-scale System failures or Deficiencies by collecting the following information: 1) mean time between reported Deficiencies with the Software; 2) diagnosis of the root cause of the problem; and 3) identification of repeat calls or repeat Software problems.

If the Contractor fails to correct a Deficiency within the allotted period of time Stated above, the Contractor shall be deemed to have committed an Event of Default, pursuant to Section 8: State of New Hampshire Terms and Conditions - P-37. The State reserves the right to return the Contractor's product and receive a refund for all amounts paid to the Contractor, including but not limited to, applicable license fees, within ninety (90) days of notification to the Contractor of the State's refund request

xv. ADMINISTRATIVE SPECIFICATIONS

The State will not be responsible for any travel or out of pocket expenses incurred in the performance of the Services.

The Contractor shall assume all travel and related to include, but not limited to: meals, hotel/housing, airfare, car rentals, car mileage, and out of pocket expenses.

The State will not pay for any shipping or delivery fees unless specifically itemized in the Contract.

The State agency will work with the Contractor to determine the requirements for providing all necessary workspace and office equipment, including desktop computers for the Contractor's staff. If Contractor has specific requirements, they must be included in the Contractor's response to any RFQ/SOW.

Contractor personnel shall provide Services between the Work Hours as identified by the requesting State Agency, excluding State of New Hampshire holidays. Changes to this Schedule may be made upon Agreement with the State Project Manager.

As applicable, and reasonably necessary, and subject to the applicable State and federal laws and regulations and restrictions imposed by third parties upon the State, the State will provide the Contractor with access to all program files, libraries, personal computer-based systems, software packages, network systems, security systems, and hardware as required to complete the contracted Services.

The Contractor shall provide the State access to all Documents, State Data, materials, reports, and other work in progress relating to the Contract ("State Owned Documents"). Upon expiration or termination of the Contract, Contractor shall turn over all State-owned Documents, State Data, material, reports, and work in progress relating to this Contract to the State at no additional cost to the State. State-Owned Documents must be provided in both printed and electronic format.

Upon successful completion and/or termination of the Implementation of the Project, the Contractor shall own and hold all, title, and rights in any Software modifications developed in connection with performance of obligations under the Contract, or modifications to the Contractor provided Software, and their associated Documentation including any and all performance enhancing operational plans and the Contractors' special utilities. The Contractor shall license back to the State the right to produce, publish, or otherwise use such Software, source code, object code, modifications, reports, and Documentation developed under the Contract.

In no event shall the Contractor be precluded from developing for itself, or for others, materials that are competitive with, or similar to Custom Software, modifications developed in connection with performance of obligations under the Contract. In addition, the Contractor shall be free to use its general knowledge, skills, experience, and any other ideas, concepts, know-how, and techniques that are acquired or used in the course of its performance under this Agreement.

All work done must conform to standards and procedures established by the Department of Information Technology and the State.

In consideration for receiving access to and use of the computer facilities, network, licensed or developed Software, Software maintained or operated by any of the State entities, systems, equipment, Documentation, information, reports, or Database Administrator of any kind (hereinafter "Information"), Contractor understands and agrees to the following rules:

- Every Authorized User has the responsibility to assure the protection of information from unauthorized access, misuse, theft, damage, destruction, modification, or disclosure;
- Information shall be used solely for conducting official State business, and all other use or access is strictly forbidden including, but not limited to, personal, or other private and non-State use and that at no time shall Contractor access or attempt to access any information without having the express authority from the State to do so;
- At no time shall Contractor access or attempt to access any information in a manner inconsistent with the approved policies, procedures, and /or agreements relating to system entry/access;
- All Software Licensed, developed, or being evaluated by the State cannot be copied, shared, distributed, sub-licensed, modified, reverse engineered, rented, or sold, and that at all times Contractor must use utmost care to protect and keep

such Software strictly confidential in accordance with the license or any other Agreement executed by the State. Only equipment or Software owned, licensed, or being evaluated by the State, can be used by the Contractor. Personal Software (including but not limited to palmtop sync Software) shall not be installed on any equipment; and

- If the Contractor is found to be in violation of any of the above-stated rules, the Contractor may face removal from the Contract, and/or criminal or civil prosecution, if the act constitutes a violation of law.

E-Mail and other electronic communication messaging systems are State of New Hampshire property and are to be used for business purposes only. Email is defined as "internal email systems" or "State-funded email systems." Contractor understands and agrees that use of email shall follow State standard policy (available upon request).

The Internet/Intranet is to be used for access to and distribution of information in direct support of the business of the State of New Hampshire according to State standard policy (available upon request).

xvi. **FORCE MAJUERE**

Neither Contractor nor the State shall be responsible for delays or failures in performance resulting from unforeseeable events beyond the control of such party and without fault or negligence of such party. Such events shall include acts of God, strikes, lock outs, riots, and acts of War, epidemics, fire, power failures, nuclear accidents, earthquakes, and unusually severe weather.

Except in the event of the foregoing, Force Majeure events shall not include Contractor's inability to hire or provide personnel needed for the Contractor's performance under the Contract.

xvii. **STATE CONFIDENTIAL INFORMATION**

In performing its obligations under the Contract, the Contractor may gain access to information of the State, including State Confidential Information. "State Confidential Information" shall include, but not be limited to, information exempted from public disclosure under New Hampshire RSA chapter 91-A: Access to Public Records and Meetings (see e.g. RSA chapter 91-A: 5 Exemptions). The Contractor shall not use the State Confidential Information developed or obtained during the performance of, or acquired, or developed by reason of the Contract, except as is directly connected to and necessary for the Contractor's performance under the Contract.

The Contractor agrees to maintain the confidentiality of and to protect from unauthorized use, disclosure, publication, and reproduction (collectively "release"), all State Confidential Information that becomes available to the Contractor in connection with its performance under the Contract, regardless of its form.

Any disclosure of the State Confidential information shall require prior written approval of the State. The Contractor shall immediately notify the State if any request, subpoena or other legal process is served upon the Contractor regarding the State Confidential Information, and

the Contractor shall cooperate with the State in any effort it undertakes to contest the request, the subpoena or other legal process, at no additional cost to the State.

In the event of unauthorized use or disclosure of the State's Confidential Information, the Contractor shall immediately notify the State, and the State shall immediately be entitled to pursue any remedy at law and in equity, including, but not limited to injunctive relief.

Insofar as the Contractor seeks to maintain the confidentiality of its confidential or proprietary information, the Contractor must clearly identify in writing the information it claims to be confidential or proprietary. The Contractor acknowledges that the State is subject to the Right to Know Law, RSA chapter 91-A. In the event the State receives a request for the information identified by the Contractor as confidential, the State will notify the Contractor and specify the date the State will be releasing the requested information. At the request of the State, the Contractor shall cooperate and assist the State with the collection and Review of the Contractor's information, at no additional expense to the State. Any effort to prohibit or enjoin the release of the information shall be the Contractor's sole responsibility and at the Contractor's sole expense. If the Contractor fails to obtain a court order enjoining the disclosure, the State shall release the information on the date specified in the State's notice to the Contractor without any State liability to the Contractor.

In the event of a Data Breach, the Contractor shall comply with provisions of NH RSA 359-C.

xviii. TRANSMISSION OF CONFIDENTIAL DATA

Application Encryption: Contractor attests the applications have been evaluated by an expert knowledgeable in cybersecurity and that said application's encryption capabilities ensure secure transmission via the internet if transmitting data containing confidential data between applications.

Computer Disks and Portable Storage Devices: Contractor may not use computer disks or portable storage devices, such as a thumb drive, as a method of transmitting Confidential Data. Encrypted thumb drives may be used with written exception from the State.

Encrypted Email: Contractor may only employ email to transmit Confidential Data if email is encrypted and being sent to and being received by email addresses of persons authorized to receive such information.

Encrypted Web Site: If Contractor is employing the Web to transmit Confidential Data, all data must be encrypted in transit using TLSv1.2 or higher.

File Hosting Services, also known as File Sharing Sites: Contractor may not use file hosting services, such as Dropbox or Google Cloud Storage, to transmit Confidential Data, without written exception from the State.

Ground Mail Service: Contractor may only transmit Confidential Data via certified ground mail or other delivery service with document/parcel tracking and receipt signature systems, such as UPS or FedEx, within the continental U.S. and when sent to a named individual.

Open Wireless Networks: Contractor may not transmit Confidential Data via an open wireless network, unless employing a secure method of transmission or remote access, such as a virtual private network (VPN).

Remote User Communication: If Contractor is employing remote communication to access or transmit Confidential Data, a secure method of transmission or remote access must be used.

SSH File Transfer Protocol also known as Secure File Transfer Protocol (SFTP): If Contractor is employing an SFTP to transmit Confidential Data, Contractor will structure the Folder and access privileges to prevent inappropriate disclosure of information. SFTP folders and sub-folders used for transmitting Confidential Data will be coded for 24-hour auto-deletion cycle (i.e. Confidential Data will be deleted every 24 hours).

Wireless Devices: If Contractor is transmitting Confidential Data via wireless devices, all Confidential Data must be encrypted to prevent inappropriate disclosure of information and devices must be password protected.

xix. RETENTION AND DISPOSITION OF IDENTIFIABLE RECORDS

The Contractor shall retain the Confidential Data for the duration of this Contract. Upon the termination of the Contract, the Contractor shall return the Data in whatever form it may exist to the State within 30 days of the Contract termination. Only upon return of the Data to the State, the Contractor shall destroy the Data unless instructed otherwise by the State.

I. Retention

Contractor agrees:

- Not to store, transfer or process Confidential Data collected in connection with the services rendered under this Contract and RFW/SOW outside of the United States. This physical location requirement shall also apply in the implementation of cloud computing, cloud service or cloud storage capabilities, and includes backup data and Disaster Recovery locations.
- Confidential Data will not be stored on personal devices.
- To ensure proper security monitoring capabilities are in place to detect potential security events that can impact State of NH systems and/or State Confidential Data for contractor provided systems accessed or utilized for purposes of carrying out this Contract.
- To provide or require security awareness and education for/of its End Users in support of protecting Confidential Data.
- To retain all electronic and hard copies of Confidential Data in a secure location.
- Confidential Data stored in a Cloud must be in a Government Cloud compliant solution and comply with all applicable statutes and regulations regarding the privacy and security. All Contractor controlled servers and devices must follow the hardening

standards as outline in NIST 800-123

(<https://nvlpubs.nist.gov/nistpubs/legacy/sp/nistspecialpublication800-123.pdf>). As well as current, updated, and maintained anti-malware utilities (e.g. anti-viral, anti-hacker, anti-spam, anti-spyware). The environment, as a whole, must have intrusion-detection services and intrusion protection services, as well as, firewall protection.

- To cooperate with the State's Chief Information Security Officer (CISO) in the detection of any security vulnerability of the hosting infrastructure.

II. Disposition

- If the Contractor will maintain any Confidential Data on its systems (or its sub-contractor systems), the Contractor will maintain a documented process for securely disposing of such data upon request or contract termination. The Contractor will also obtain written certification for any State of New Hampshire data destroyed by the Contractor or any subcontractors as a part of ongoing, emergency, and or disaster recovery operations. When no longer in use, electronic media containing State of New Hampshire Confidential Data shall be rendered unrecoverable via a secure wipe program in accordance with industry-accepted standards for secure deletion and media sanitization, or otherwise physically destroying the media (for example, degaussing) as described in NIST Special Publication 800-88, Rev 1, Guidelines for Media Sanitization, National Institute of Standards and Technology, U. S. Department of Commerce.
- The Contractor shall provide the State with written certification, including date and time of data destruction, asserting that data was destroyed per this Agreement. The written certification will include all details necessary to demonstrate Confidential Data has been properly destroyed and validated. Where applicable, regulatory and professional standards for retention requirements will be jointly evaluated by the State and Contractor prior to destruction. In the event where the contractor has comingled Confidential Data and the destruction is not feasible the State and Contractor will jointly evaluate regulatory and professional standards for retention requirements prior to destruction.

xx. PROCEDURES FOR SECURITY

1. Contractor agrees to safeguard the Confidential Data received under this Contract, and any Derivative Data or files, as follows
 - a. The Contractor will maintain proper security controls to protect Confidential Data, collected, processed, managed, and/or stored in the delivery of contracted services.
 - b. The Contractor will maintain policies and procedures to protect Confidential Data throughout the information lifecycle, where applicable, (from creation, transformation, use, storage and secure destruction) regardless of the media used to store the data (i.e., tape, disk, paper, etc.).
 - c. The Contractor will maintain appropriate authentication and access controls to contractor systems that collect, transmit, or store Confidential Data where applicable.
 - d. If the Contractor will be sub-contracting any core functions of the Contract and or RFQ/SOW supporting the services thereunder, the Contractor will ensure End User(s)

will maintain an internal process or processes that defines specific security expectations, and monitoring compliance to security requirements that are equivalent with the obligations imposed on the Contractor by this Agreement.

- e. The Contractor will work with the State to sign and comply with all applicable State of New Hampshire and Department system access and authorization policies and procedures, systems access forms, and computer use agreements as part of obtaining and maintaining access to any Confidential Data or system(s). Agreements will be completed and signed by the Contractor and any applicable sub-contractors prior to system access being authorized.
 - f. If the State determines the Contractor is a Business Associate pursuant to 45 CFR 160.103, the Contractor will execute a HIPAA Business Associate Agreement (BAA) with the State and is responsible for maintaining compliance with the BAA.
 - g. In the event of an Incident, Computer Security Incident, or Privacy Breach the Contractor shall make immediate efforts to contain the Incident/Privacy Breach, to minimize any damage or loss resulting from the Incident, Computer Security Incident, or Privacy Breach, as well as, investigate the cause(s) and promptly take measures to prevent future Incidents, Computer Security Incidents, or Privacy Breaches of a similar nature from reoccurring.
 - h. Contractor agrees to maintain a documented Breach Notification and Incident Response process that complies with the requirements of this Information Security Requirements Exhibit.
 - i. Contractor must, comply with all applicable state and federal laws relating to the privacy and security of Confidential Data, and safeguard the Confidential Data at a level consistent with the requirements applicable to state and federal agencies. Contractor agrees to establish and maintain appropriate administrative, technical, physical, and organizational safeguards to protect the confidentiality of the Confidential Data and to prevent unauthorized use or access to it. The safeguards must provide a level and scope of security that is not less than the level and scope of security requirements that is set forth in the principles of NIST 800-53 (Rev.4).
 - j. Contractor agrees to use the minimum necessary Confidential Data in performance of this Contract.
 - k. The Contractor is responsible for ensuring End User compliance with the terms and conditions of the Contract and this Information Security Requirements Exhibit.
 - l. The State reserves the right to conduct onsite inspections to monitor compliance with this Contract, including the privacy and security requirements provided herein, HIPAA, and other applicable laws and Federal regulations until such time as the Confidential Data is disposed of in accordance with this Contract.
2. The State reserves the right to conduct onsite inspections to monitor compliance with this Contract, including the privacy and security requirements provided herein, HIPAA, and other applicable State and federal laws and regulations until such time as the Confidential Data is disposed of in accordance with this Contract.

xxi. LOSS REPORTING

The Contractor must notify the State of any information security events, computer security incidents, or privacy breaches as soon as feasible, but no more than 24 hours after the Contractor has determined that the aforementioned has occurred and that Confidential Data may have been exposed or compromised.

If a suspected or known information security event, computer security incident or privacy breach involves Social Security Administration (SSA) provided data or Internal Revenue Services (IRS) provided Federal Tax Information (FTI), the contractor must notify the State immediately and without delay.

The Contractor must comply with all applicable state and federal laws relating to the privacy and security of Confidential Data, and safeguard the Confidential Data at the level consistent with the requirements applicable to state and federal agencies. In addition to, and notwithstanding, Contractor's compliance with all applicable obligations and procedures, Contractor's procedures must also address how the Contractor will:

- a. Identify Incidents;
- b. Determine if Confidential Data is involved in Incidents;
- c. Report suspected or confirmed Incidents as required in this Information Security Requirements Exhibit;
- d. Identify and convene a core response group to determine the risk level of Incidents and determine risk-based responses to Incidents and mitigation measures;
- e. Identify Incident/Breach notification method and timing; and
- f. Address and report Incidents, Computer Security Incidents, Privacy, and/or Breaches that implicate personal information (PI) in accordance with NH RSA 359-C:20 and this Agreement.

5. TERMINATION

a. Termination for Default

Upon the occurrence of any Event of Default, the State may take the following action:

- Procure Services that are the subject of the Contract from another source and the Contractor shall be liable for reimbursing the State for the replacement Services, and all administrative costs directly related to the replacement of the Contract and procuring the Services from another source, such as costs of competitive bidding, mailing, advertising, applicable fees, charges or penalties, and staff time costs; all of which shall be subject to the limitations of liability set forth in the Contract.

b. Termination Procedure

Upon termination of the Contract for any reason, the State, in addition to any other rights provided in the Contract, may require the Contractor to deliver to the State any property, including without limitation, Software and Written Deliverables, for such part of the Contract as has been terminated.

After receipt of a notice of termination, and except as otherwise directed by the State, Contractor shall:

1. Stop work under the Contract on the date, and to the extent specified, in the notice;

2. Provide written Certification to the State that Contractor has surrendered to the State all said property.

c. Termination

All RFQ/SOW shall automatically terminate in the event that this Contract terminates for any reason.

6. OBLIGATIONS AND LIABILITY OF THE CONTRACTOR

The Contractor shall provide all services strictly pursuant to, and in conformity with, the specifications under the terms of this Contract and as described in State RFP #2348-21.

**LIMITATION OF LIABILITY
CONTRACTOR**

Subject to applicable laws and regulations, in no event shall the Contractor be liable for any consequential, special, indirect, incidental, punitive or exemplary damages and the Contractor's liability to the State for any claims, liabilities, or expenses relating to this Contract shall not exceed two times (2X) the total Contract price set forth in Contract Agreement – P-37, General Provisions, Block 1.8.

Notwithstanding the monetary limitation contained in this paragraph above, in the event a claim or action is brought against the State in which infringement, violation of Contractor's obligations under the Business Associate Agreement, and/or any third party claims for bodily injury, death, or damage to real or tangible personal property to the extent caused by the

Contractor's negligence or willful misconduct are alleged, the Contractor, at its own expense, shall defend, indemnify and hold harmless the State against all such claims or actions for any expenses, costs or damages, including legal fees and expenses, incurred by the State in connection with such claims or actions.

7. DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION LOWER TIER COVERED TRANSACTIONS

The Contractor certifies, by signature of this Contract, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal or State Department or Agency.

8. INSURANCE

Certificate of insurance amounts must be met and maintained throughout the term of the Contract and any extensions as per the P-37, section 14 and cannot be cancelled or modified until the State receives a 10 day prior written notice.

9. CONFIDENTIALITY & CRIMINAL RECORD

If requested by the Using Agency, the Contractor and its employees, and Sub-Contractors (if any), shall sign and submit a Confidential Nature of Department Records Form and a Criminal Authorization Records Form. These forms shall be submitted to the Using Agency prior to the start of any work.

10. ADDITIONAL REQUIREMENTS

- a. The State requires ten (10) days' advance knowledge of work schedules to provide security and access to respective work areas. No premium charges will be paid for any off-hour work.
- b. The State shall require correction of defective work or damages to any part of a building or its appurtenances when caused by the Contractor's employees, equipment or supplies. The Contractor shall replace in satisfactory condition all defective work and damages rendered thereby or any other damages incurred. Upon failure of the Contractor to proceed promptly with the necessary corrections, the State may withhold any amount necessary to correct all defective work or damages from payments to the Contractor.
- c. The Contractor or their personnel shall not represent themselves as employees or agents of the State.
- d. While on State property, Contractor's employees shall be subject to the control of the State, but under no circumstances shall such persons be deemed to be employees of the State.
- e. All personnel shall observe all regulations or special restrictions in effect at the State Agency.
- f. The Contractor's personnel shall be allowed only in areas where services are being performed. The use of State telephones is prohibited.
- g. **TERMS AND DEFINITIONS**

Acceptance	Notice from the State that a Deliverable has satisfied Acceptance Test or Review.
Access Control	Supports the management of permissions for logging onto a computer or network.
Appendix	Supplementary material that is collected and appended at the back of a document.
Authorized User	The Contractor's employees, Contractors, Subcontractors or other agents who have permission to access the State's Personal Data

	to enable the Contractor to perform the Service required.
Breach or Breach of Security	Unlawful and unauthorized acquisition of unencrypted computerized Data that materially compromises the security, Confidentiality or integrity of personal information maintained by a person or commercial entity.
Certification	The Contractor's written declaration with full supporting and written Documentation (including without limitation test results as applicable) that the Contractor has completed development of the Deliverable and certified its readiness for applicable Acceptance Testing or Review.
Change Control	Formal process for initiating changes to the proposed Solution or process once development has begun.
Change Control Procedures (CCP)	Formal process for initiating changes to the proposed Solution or process once development has begun through the use of a Change Request/Order or CR.
Change Management	A process designed to help control the life cycle of strategic, tactical, and operational changes to IT services through standardized procedures. The goal of Change Management is to control risk and minimize disruption to associated IT services and business operations.
Change Order	Consists of changes which range from minor changes to significant changes that drastically alter the project, however, typically formal change requests involve more significant changes and the less impactful changes are made at the project management level. The change order must be made formally, via a written proposal or request form typically, and that changes are not to be implemented until they are formally approved.

CJIS	Means sensitive information like fingerprints and criminal backgrounds gathered by local, state, and federal criminal justice and law enforcement agencies as defined in the Criminal Justice Information Services (CJIS) Security Policy, a joint program of the FBI, State Identification Bureaus, and CJIS Systems Agency.
Cloud/Cloud Government Environment	Refers to all the cloud computing and virtualization products and solutions that are developed specifically for government organizations and institutions.
Completion Date	End date for the Contract.
Computer Security Incident	Means "Computer Security Incident" as stated in Section 2.1 of <u>NIST Publication 800-61 Rev. 2</u> , Computer Security Incident Handling Guide
Confidential Data	Means all information owned, managed, created, received, from or on behalf of the State that is protected by information security, privacy or confidentiality rules and state and federal laws. This information includes but is not limited to Derivative Data, Protected Health Information (PHI), Personally Identifiable Information (PII), Federal Tax Information, Social Security Administration, and CJIS (Criminal Justice Information Services) data.
Confidential Information	Information required to be kept Confidential from unauthorized disclosure under the Contract.
Contract	This Agreement between the State of New Hampshire and a Contractor, which creates binding obligations for each party to perform as specified in the Contract Documents.
Contract Conclusion	Refers to the conclusion of the Contract, for any reason, including but not limited to, the successful Contract completion, termination for convenience, or termination for default.
Contract Documents	Documents that comprise this Contract.
Contract Managers	The persons identified by the State and the Contractor who shall be responsible for all

	contractual authorization and administration of the Contract. These responsibilities shall include but not be limited to processing Contract Documentation, obtaining executive approvals, tracking costs and payments, and representing the parties in all Contract administrative activities.
Contract Price	The total, not to exceed amount to be paid by the State to the Contractor for product and Services described in the Contract Agreement. This amount is listed in Part 1, P-37 General Provisions - Section 1.8: Price Limitation.
Contractor/Contracted Contractor	The Contractor whose proposal or quote was awarded a Contract with the State and who is responsible for the Services and Deliverables of the Contract.
Cure Period	The thirty (30) day period following written notification of a default within which a Contractor must cure the default identified.
Custom Software	Software developed by the Contractor specifically for a project for the State.
Data	State's records, files, forms, Data and other documents or information, in either electronic or paper form, that will be used /converted by the Contractor during the Contract Term.
Data Breach	The unauthorized access by a non-authorized person/s that results in the use, disclosure or theft of the State's unencrypted Non-Public Data.
Deficiencies/Defects	A failure, Deficiency or Defect in a Deliverable resulting in a Deliverable, the Software, or the System, not conforming to its Specifications.
Deliverable	A Deliverable is a fully qualified IT consultant provided by the Contractor to the State under the terms of a Contract requirement.
Department	An agency of the State
Department of Administrative Services (DAS)	Responsible for providing innovative leadership, quality statewide management of

	services, and ensuring an efficient/cost-effective state government.
Department of Health and Human Services (DHHS)	Responsible for the health, safety and well-being of the citizens of New Hampshire. DHHS provides services for individuals, children, families and seniors, and administers programs and services such as mental health, developmental disability, substance abuse, and public health.
Department of Information Technology (DoIT)	The Department of Information Technology established under RSA 21-R by the Legislature effective September 5, 2008.
Derivative Data	Means data or information based on or created from Confidential Data
DevOps	Is a set of practices that automates the processes between software development and IT teams, in order to build, test, and release software faster and more reliably.
Digital Signature	Certification that guarantees the unaltered state of a file, also known as "code signing".
Documentation	All information that describes the installation, operation, and use of the Software, either in printed or electronic format.
Effective Date	The Contract and all obligations of the parties hereunder shall become effective on the date the Governor and the Executive Council of the State of New Hampshire approves the Contract.
Encryption	Supports the transformation of Data for security purposes.
End User	Means any person or entity (e.g. contractor's employee, business associate, subcontractor, other downstream user) that receives Confidential Data in accordance with the terms of this Contract.
Enhancements	Updates, additions, modifications to, and new releases for the Software, and all changes to the Documentation as a result of

	Enhancements, including, but not limited to, Enhancements produced by Change Orders.
Fully Loaded	Rates are inclusive of all allowable expenses, including, but not limited to: meals, hotel/housing, airfare, car rentals, car mileage, and out of pocket expenses.
Governor and Executive Council	The New Hampshire Governor and Executive Council.
Health Insurance Portability and Accountability (HIPAA)	Means the Health Insurance Portability and Accountability Act of 1996 and the regulations promulgated thereunder.
Identification and Authentication	Supports obtaining information about those parties attempting to log on to a System or application for security purposes and the validation of those users.
Incident	Means an act that potentially violates an explicit or implied security policy, which includes successful attempts to gain unauthorized access to a system or its data, unwanted disruption or denial of service, the unauthorized use of a system for the processing or storage of data; and changes to system hardware, firmware, or software characteristics without the owner's knowledge, instruction, or consent. Incidents include the loss of data through theft or device misplacement, loss or misplacement of hardcopy documents, and misrouting of physical or electronic mail.
Input Validation	Ensure that the values entered by users or provided by other applications meets the size, type and format expected. Protecting the application from cross site scripting, SQL injection, buffer overflow, etc.
Intrusion Detection	Supports the detection of illegal entrance into a computer system.
Information Technology (IT)	Refers to the tools and processes used for the gathering, storing, manipulating, transmitting, sharing, and sensing of information including, but not limited to, Data processing, computing, information systems,

	telecommunications, and various audio and video technologies.
Key Project Staff	Personnel identified by the State and by the Contractor as essential to work on the Project.
Licensee	The State of New Hampshire
Non Exclusive Contract	A contract executed by the State that does not restrict the State from seeking alternative sources for the Deliverables or Services provided under the Contract.
Non-Software Deliverables	Deliverables that are not Software Deliverables or Written Deliverables, e.g., meetings, help support, service, other.
Notice to Proceed (NTP)	The State Contract Manager's written direction to the Contractor to begin work on the Contract on a given date and time.
Not to Exceed (NTE)	The total contract value committed by the State of New Hampshire that will not exceed the amount of the Contractor's firm proposal and estimates.
Open Wireless Network	Means any network or segment of a network that is not designated by the State of New Hampshire's Department of Information Technology or delegate as a protected network (designed, tested, and approved, by means of the State, to transmit) will be considered an open network and not adequately secure for the transmission of unencrypted Confidential Data.
Operational	The System is operating and fully functional, all Data has been loaded; the System is available for use by the State in its daily operations, and the State has issued an Acceptance Letter.
Order of Precedence	The order in which Contract/Documents control in the event of a conflict or ambiguity. A term or condition in a document controls over a conflicting or ambiguous term or condition in a document that is lower in the Order of Precedence.

Personally Identifiable Information (PII)	Means any data that could potentially identify a specific individual. Any information that can be used to distinguish one person from another and can be used for de-anonymizing anonymous data can be considered PII
Privacy Breach	Means the loss of control, compromise, unauthorized disclosure, unauthorized acquisition, unauthorized access, or any similar term referring to situations where persons other than authorized users and for an other than authorized purpose have access or potential access to personally identifiable information, whether physical or electronic. With regard to Protected Health Information, "Breach" shall have the same meaning as the term "Breach" in section 164.402 of Title 45, Code of Federal Regulations.
Project	The planned undertaking regarding the entire subject matter of this Contract, RFQ/SOW and the activities of the parties related hereto.
Project Team	The group of State employees and contracted Contractor's personnel responsible for managing the processes and mechanisms required such that the Services are procured in accordance with the Work Plan on time, on budget and to the required specifications and quality.
Project Management Plan	A document that describes the processes and methodology to be employed by the Contractor to ensure a successful project.
Project Managers	The persons identified who shall function as the State's and the Contractor's representative with regard to Review and Acceptance of Contract Deliverables, invoice sign off, and review and approval of Change Requests (CR) utilizing the Change Control Procedures (CCP).
Protected Health Information (PHI)	With regard to Protected Health Information, "Breach" shall have the same meaning as the term "Breach" in section 164.402 of Title 45, Code of Federal Regulations.
Regression Test Plan	A plan integrated into the Work Plan used to ascertain whether fixes to Defects have

	caused errors elsewhere in the application/process.
Review	The process of reviewing Deliverables for Acceptance.
Review Period	The period set for Review of a Deliverable. If none is specified then the Review Period is five (5) business days.
Role/Privilege Management	Supports the granting of abilities to users or groups of users of a computer, application or network.
Schedule	The dates described in the Work Plan for deadlines for performance of Services and other Project events and activities under the Contract.
Security Rule	Means the Security Standards for the Protection of Electronic Protected Health Information at 45 C.F.R. Part 164, Subpart C, and amendments thereto.
Services	The work or labor to be performed by the Contractor on the Project as described in the Contract.
Software	All custom Software and COTS Software provided by the Contractor under the Contract.
Software Deliverables	The Software provided under this Contract and any Enhancements.
Software License	Licenses provided to the State under this Contract.
Solution	The Solution consists of the total Solution, which includes, without limitation, Software and Services, addressing the requirements and terms of the Contract Specifications as a response to this RFP.
Specifications	The written Specifications that set forth the requirements which include, without limitation, this RFP, the Proposal, the Contract, any performance standards, Documentation, applicable State and federal policies, laws and regulations, State technical standards,

	subsequent State-approved Deliverables, and other Specifications and requirements described in the Contract Documents. The Specifications are, by this reference, made a part of the Contract as though completely set forth herein.
Standard Operating Procedure (SOP)	Is a set of step-by-step instructions compiled by an organization for users to carry out complex routine operations. SOPs aim to achieve efficiency, quality output and uniformity of performance, while reducing miscommunication within the organization.
State	STATE is defined as: State of New Hampshire Department of Administrative Services 20 Capitol Street Concord, NH 03301 The term "State" shall include all state agencies.
Statement of Work (SOW)	A Statement of Work clearly defines the basic requirements and objectives of a Project. The Statement of Work also defines a high level view of the architecture, performance and design requirements, the roles, and responsibilities of the State and the Contractor. The SOW defines the results that the Contractor remains responsible and accountable for achieving.
State's Confidential Records	State's information regardless of its form that is not subject to public disclosure under applicable state and federal laws and regulations, including but not limited to RSA Chapter 91-A.
State Data	Any information contained within State systems in electronic or paper format.
State Fiscal Year (SFY)	The New Hampshire State Fiscal Year extends from July 1st through June 30th of the following calendar year.

State's Project Manager (PM)	State's representative with regard to Project management and technical matters. Agency Project Managers are responsible for review and Acceptance of specific Contract Deliverables, invoice sign off, and Review and approval of a Change Request (CR).
Subcontractor	A person, partnership, or company not in the employment of, or owned by, the Contractor, which is performing Services under this Contract under a separate Contract with or on behalf of the Contractor.
System	All Software, specified hardware, and interfaces and extensions, integrated and functioning together in accordance with the Specifications.
System Integrator (SI)	A Contractor that specializes in bringing together component subsystems into a whole and ensuring that those subsystems function together, a practice known as system integration. They also solve problems of automation.
TBD	To Be Determined
Term	Period of the Contract from the Effective Date through Contract End Date.
Test Plan	A plan, integrated in the Work Plan, to verify the code (new or changed) works to fulfill the requirements of the Project. It may consist of a timeline, a series of tests and test Data, test scripts and reports for the test results as well as a tracking mechanism.
Using Agency	A State of New Hampshire Agency that submitted a request for a quote from vendor(s).
Verification	Supports the confirmation of authority to enter a computer system application or network.
Virtual Private Network (VPN)	Extends a private network across a public network, and enables users to send and receive Data across shared or public networks as if their computing devices were directly connected to the private network.

Warranty Period	A period of coverage during which the contracted Contractor is responsible for providing a guarantee for products and services delivered as defined in the contract.
Work Hours	Contractor personnel shall provide Services between the Work Hours as identified by the requesting State Agency, excluding State of New Hampshire holidays. Changes to this schedule may be made upon agreement with the State Project Manager. State holidays are: New Year's Day, Martin Luther King Day, President's Day, Memorial Day, July 4 th , Labor Day, Veterans Day, Thanksgiving Day, the day after Thanksgiving Day, and Christmas Day. Specific dates will be provided upon request.
Work Plan	The overall plan of activities for the Project created in accordance with the RFQ/SOW. The plan and delineation of tasks, activities and events to be performed and Deliverables to be produced under the Project. The Work Plan shall include a detailed description of the Schedule, tasks/activities, Deliverables, critical events, task dependencies, and the resources that would lead and/or participate on each task.

**EXHIBIT C
METHOD OF PAYMENT**

1. CONTRACT PRICE

The Contractor hereby agrees to provide Salesforce Professional services in complete compliance with the terms and conditions of this Agreement and any future Statement of Work awarded to the Contractor. The Contractor acknowledges and agrees that this is a not-to-exceed Agreement with an aggregate price limitation of \$10,000,000.00 for all future SOW. This price limitation is shared between multiple vendors, and no funds will be paid to the Contractor once the price limitation is reached. This price limitation is not considered a guaranteed or minimum figure; however it shall be considered a maximum figure for all future SOW from the effective date through the expiration date as indicated in Form P-37 Block 1.7.

Both Parties acknowledge and agree that this Contract shall not be exclusive in any respect.

2. PRICING STRUCTURE

Contractor shall provide the services at the not-to-exceed hourly rates set in the Table below. This pricing for hourly staff or Project staffing shall be effective for the term of this Contract, any extensions thereof and the Statement of Work.

Position	Year 1 Contract Approval – 12/31/21	Year 2 1/1/22 – 12/31/22	Year 3 1/1/23 – 12/31/23
	Hourly Rate Not to Exceed	Hourly Rate Not to Exceed	Hourly Rate Not to Exceed
Program Manager	\$245.00	\$252.35	\$259.92
Scrum Master	\$205.00	\$211.15	\$217.48
Salesforce Technical Architect	\$255.00	\$262.65	\$270.53
Salesforce Administrator	\$215.00	\$221.45	\$228.09
Salesforce Platform Developer	\$215.00	\$221.45	\$228.09
Salesforce Data Architect	\$255.00	\$262.65	\$270.53
Salesforce Business Analyst	\$190.00	\$195.70	\$201.57
Salesforce Training Consultant	\$205.00	\$211.15	\$217.48

3. FUTURE PRICING REQUESTS

The State reserves the right to either seek additional discounts from Contractor or to contract separately for a single purchase, if in the judgment of the State, the Project required is sufficiently large, to enable the State to realize a cost savings, over and above the prices set forth in Exhibit C Section 2, whether or not such a savings actually occurs.

4. INVOICE

Itemized invoices shall be submitted to the requesting agency after the completion of the job/services and shall include a brief description of the work done along with the location of work.

Contractor shall be paid within 30 days after receipt of properly documented invoice and acceptance of the work to the State's satisfaction.

5. PAYMENT

Payments may be made via ACH or P-Card. Use the following link to enroll with the State Treasury for ACH payments: <https://www.nh.gov/treasury>

EXHIBIT D

RFP #2425-21 is incorporated here within.

EXHIBIT E – Salesforce Managed Services RFQ Worksheet/Template

Purpose: To request a proposal from prequalified Salesforce Managed Services vendors for a specific Scope of Work. All Statements of Work shall adhere to this worksheet. All the terms and conditions within the Salesforce Managed Services Contract RFP 2348-21 are applicable to this scope of work.

Salesforce Professional Services Managed Services RFQ	
INFORMATION	
Date: MM/DD/YYYY	Proposal Due Date: MM/DD/YYYY
Project Name:	
Agency Supported:	Submitter: <Name> <Title> <Contact Information>
Mandatory Expertise or Contractor Qualifications: • Text	
Key Staff Required with Subject Matter Expertise: • Staff assigned to the following roles shall have knowledge of (X) Programs and experience with (X) requirements o Staff Title – Text o Staff Title – Text	
Sample Work plan and Methodology Required?	Key Contractor Staff Resumes Required?
Compliance Requirements:	
STATEMENT OF WORK	
Project Overview: Describe how the work will meet statutory/regulatory/business requirements for the Agency that is associated with the project.	
Background and Current Processes:	
Assumptions/Risk Mitigation Plan:	
PROJECT DELIVERABLES AND MILESTONES	
Deliverables:	

Milestones:

INTERFACE REQUIREMENTS

Interfaces Required?

Assumptions/Risk Mitigation Plan

STATE TEAM

SOW Project Manager

<Name>

<Title>

<Contact Information>

Key Team Members

<Role>

<Name>

<Title>

<Contact Information>

<Role>

<Name>

<Title>

<Contact Information>

Evaluation Criteria (for SOW awards)

All awards for the SOW will be based on the following criteria. (The agency will select award criteria and point allocations.)

For example purposes only:

1. Ability to meet "Mandatory Expertise or Contractor Qualifications" – 30 Points
2. Ability to meet "Key Staff Required with Subject Matter Expertise" – 20 Points
3. Optional interviews as deemed necessary by the State – 20 Points
4. Total cost – 30 Points

Note: Points must total 100.

New Hampshire Salesforce Contract

Final Audit Report

2021-07-21

Created:	2021-07-21
By:	Claire Farrell (claire.farrell@slalom.com)
Status:	Signed
Transaction ID:	CBJCHBCAABAAJWUXFXo2LQX42FggUXS8e1hx5oYqQc

"New Hampshire Salesforce Contract" History

-  Document created by Claire Farrell (claire.farrell@slalom.com)
2021-07-21 - 3:04:16 PM GMT- IP address: 73.123.224.56
-  Document emailed to russell@slalom.com for signature
2021-07-21 - 3:32:29 PM GMT
-  Email sent to russell@slalom.com bounced and could not be delivered
2021-07-21 - 3:39:19 PM GMT
-  Claire Farrell (claire.farrell@slalom.com) replaced signer russell@slalom.com with Russell Norris (russelln@slalom.com)
2021-07-21 - 3:42:05 PM GMT- IP address: 73.123.224.56
-  Document emailed to Russell Norris (russelln@slalom.com) for signature
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-  Email viewed by Russell Norris (russelln@slalom.com)
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-  Document e-signed by Russell Norris (russelln@slalom.com)
Signature Date: 2021-07-21 - 3:45:06 PM GMT - Time Source: server- IP address: 24.147.215.211
-  Agreement completed.
2021-07-21 - 3:45:06 PM GMT

slalom

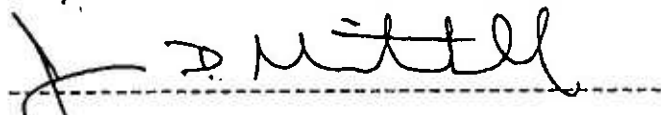
POWERED BY
Adobe Sign

Secretary's Certificate

I, James D. Mitchell, certify that I am the duly elected Secretary of Slalom, LLC, a limited liability company organized under the laws of the State of Colorado ("Slalom").

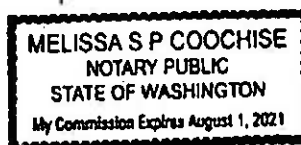
I further certify that Russell Norris is a General Manager of Slalom and is authorized to sign and submit the bid to the State of New Hampshire on behalf Slalom. The Bid was duly signed for and on behalf of Slalom by authority of its Board of Directors and is within the scope of its corporate powers.

This 29th day of June, 2021


James D. Mitchell

On this 29th day of June, 2021, before me James D. Mitchell, the undersigned officer, personally appeared, satisfactorily proven to be the person whose name is subscribed to the within instrument, and acknowledged that he executed the same for the purposes contained therein. In witness whereof, I hereunto set my hand and official seal.





821 2nd Avenue
Suite 1900
Seattle, WA 98104
206-438-5700

slalom

State of New Hampshire

Department of State

CERTIFICATE

I, William M. Gardner, Secretary of State of the State of New Hampshire, do hereby certify that SLALOM, LLC is a Colorado Limited Liability Company registered to transact business in New Hampshire on June 01, 2020. I further certify that all fees and documents required by the Secretary of State's office have been received and is in good standing as far as this office is concerned.

Business ID: 843174

Certificate Number: 0005385926



IN TESTIMONY WHEREOF,

I hereto set my hand and cause to be affixed
the Seal of the State of New Hampshire,
this 23rd day of June A.D. 2021.

A handwritten signature in cursive script, appearing to read "Wm Gardner".

William M. Gardner
Secretary of State



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/29/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Parker, Smith & Feek, Inc. 2233 112th Avenue NE Bellevue, WA 98004	CONTACT NAME: PHONE (AFC No. Ext): 425-709-3600 FAX (AFC No.): 425-709-7460 E-MAIL: ADDRESS:	
	INSURER(S) AFFORDING COVERAGE INSURER A: Charter Oak Fire Insurance Co. INSURER B: Travelers Prop. Casualty Co. of Amer. INSURER C: INSURER D: INSURER E: INSURER F:	
INSURED Statom LLC 821 Second Ave., Ste 1900 Seattle, WA 98104	NAIC #	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDITIONAL INSURER	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY ☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PROJECT ☒ LOC		H220630157D5008COF21	01/01/2021	01/01/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPROP AGG \$ 2,000,000
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ☐ NON-OWNED AUTOS					COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB ☐ OCCUR ☐ CLAIMS-MADE DED ☐ RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	☐ Y ☒ N	N/A	UB1L4991042113K ** EL Stop Gap: Monopolistic States	01/01/2021	01/01/2022

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
Exhibit of Insurance

CERTIFICATE HOLDER

CANCELLATION

State of New Hampshire
Administrative Services, Bureau of Purchase
and Property
25 Capital Street, Room 102
Concord, NH 03301

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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