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**STATE OF NEW HAMPSHIRE**  
**DEPARTMENT OF INFORMATION TECHNOLOGY**  
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**Denis Goulet**  
 Commissioner

October 29, 2024

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

**REQUESTED ACTION**

Authorize the Department of Information Technology to enter into a project agreement with CoreSphere, LLC. (VC# 336219) utilizing Statewide contract # 8002969 under the Department of Administrative Services Statewide Master Agreements for Salesforce Professional Services in the amount not to exceed \$1,281,972, for the purpose of continuing the migration of OPLC's Online Licensing, effective upon Governor and Council approval through December 30, 2025. The Governor and Executive Council approved the Salesforce Professional Services Contracts on October 13, 2021, item #97, as amended on December 20, 2023, item #5Z. Source of Funds: 100% Federal Funds.

Funds are available in the following account:

CAT#-DEPT#-AGENCY#-ACTIVITY#-ACCOUNTING UNIT #- DEPT NAME- ACCOUNTING UNIT NAME CLASS- OBJECT - DESC	ACTIVITY CODE	FY 25
01-03-003-030010-26630000-Dept of Information Technology-DoIT ARP Licensing Portal-046-500465- Consultants	00FRF602PH0306A	\$1,281,972

**EXPLANATION**

The project agreement with CoreSphere LLC would enable the agency to accelerate the implementation of additional license types on the Salesforce platform and would benefit OPLC and DoIT staff by adding more time to gain familiarity with the platform prior to having to support it without the consulting help. This project agreement will continue the deployment of the Salesforce Cloud based licensing system to the public and external partners, as a complete solution with the goal of modernizing the existing online licensing and certification system, and to provide service delivery improvements in the areas of access to a customer portal for completing and submission of applications for licensure, public access to information about licensed entities, improve license administration functionality and response times.

His Excellency, Governor Christopher T. Sununu  
and the Honorable Council  
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The project agreement with CoreSphere LLC will be used to assist in the configuration and migration of numerous boards by hiring additional consultants. These consultants will assist DoIT and OPLC personnel in the transition from the legacy application to the Salesforce platform. As the project progressed, it became evident that the level of complexity in getting the platform ready to support the myriad license types in a standard constituent friendly manner warranted additional resources in order for the project to move forward in a timely and long-term supportable manner.

Contractor submissions were scored by a technical review team and the awarded vendor was identified as the high scoring vendor. Further details are included with this letter as Attachment A.

If Federal Funds are no longer available, General funds will not be used.

Respectfully submitted,



Denis Goulet  
Commissioner

DG/ra/ik  
DoIT # 2024-075  
RID # 90982



Division of Procurement Support Services  
Bureau of Purchase Property

Gary S. Lunetta  
Director  
(603) 271-2201

RFQ Bid Summary

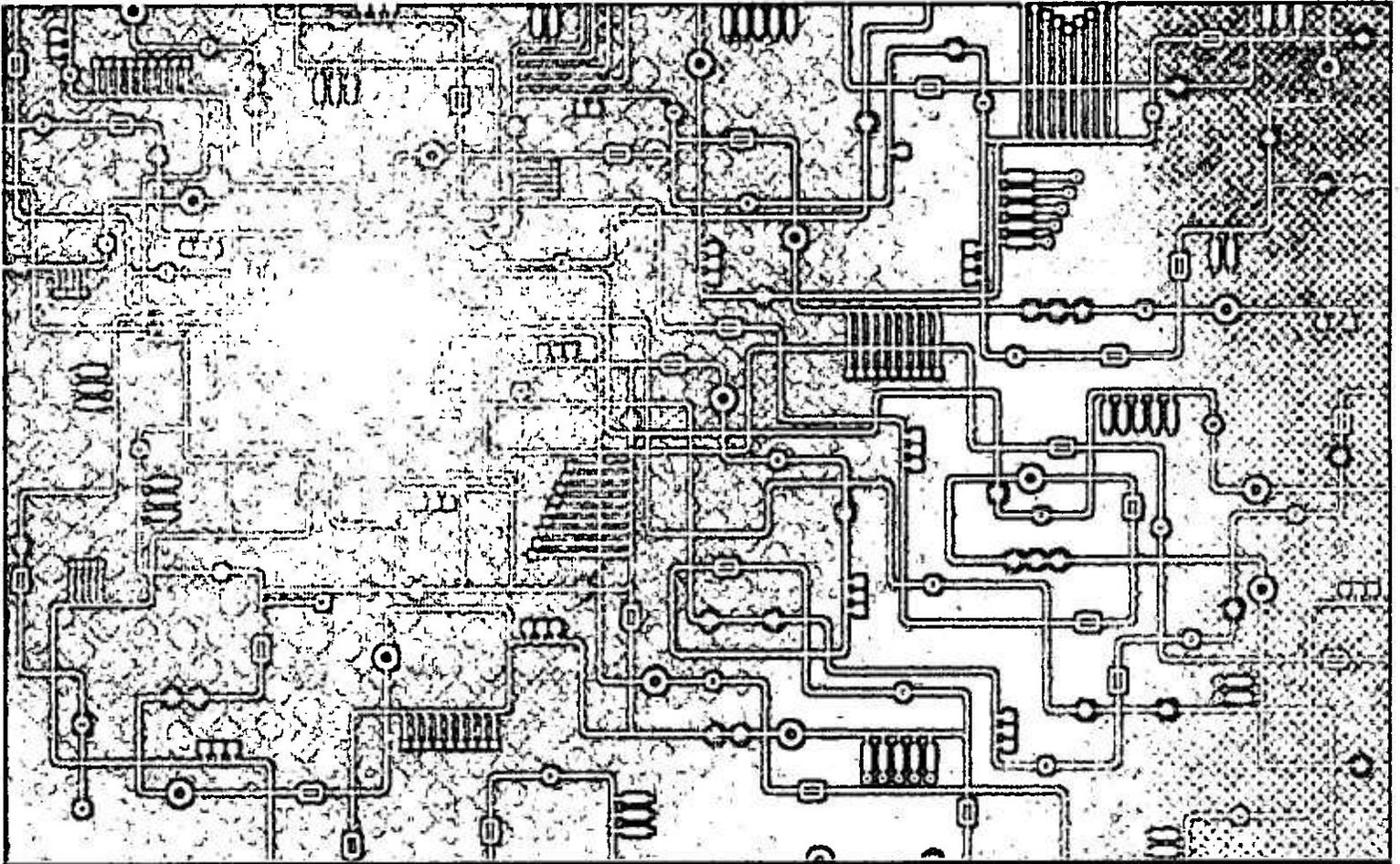
Bid Description	Online Licensing & Certification	Agency	OPLC
RFQ#	439-25	Requisition#	NA
Agent Name	Abbie Joy	Bid Closing	9/27/2024 9:00 AM

Technical Scoring				
CRITERIA	Brite Systems	CoreSphere	Slalom	Total Possible Points
Mandatory Expertise	31.00	31.50	33.50	40.00
Project Deliverables & Milestones	21.67	22.83	26.00	30.00
Key Staff	12.67	16.67	13.50	20.00
Total Score	65.34	71.00	73.00	90.00

Financial Scoring			
VENDOR	Brite Systems	CoreSphere	Slalom
Cost Proposal (Not to Exceed)	\$2,200,000.00	\$1,281,972.00	\$2,199,092.70
Financial Score <small>(Lowest Proposed Cost / Vendor's Proposed Cost) x 10</small>	5.83	10.00	5.83

TOTAL SCORE			
	Brite Systems	CoreSphere	Slalom
Technical Score	65.34	71.00	73.00
Financial Score	5.83	10.00	5.83
Total Score	71.17	81.00	78.83

Indicates highest scoring vendor



## **New Hampshire OPLC Online Licensing RFQ 439-25**

**New Hampshire  
OPLC Online Licensing RFQ 439-25  
Online Licensing & Certification  
Office of Professional Licensing & Certification  
DoIT Number DOIT #2024-075  
Salesforce: Abbie Joy [Abigail.F.Joy@das.nh.gov](mailto:Abigail.F.Joy@das.nh.gov)**

**September 27, 2024**

**Submitted by:  
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**coresphere**

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**CoreSphere, LLC is an Equal Opportunity Employer**



## Cover Sheet

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### CoreSphere Corporate Information

- DUNS: 18-476-8583
- UEI: U7QGJ84HBNA7
- CAGE Code: 37GU1
- TIN: 20-0926452

### CoreSphere Contract Vehicles:

- GSA MAS IT Schedule
- GSA 8(a) STARS III
- SBA Small Disadvantaged Business (SDB)

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## 1. Executive Summary

CoreSphere was founded in 2003 and has been delivering Salesforce Case Management solutions since 2010. We are one of only a few small businesses that earned Crest/Gold status within the Salesforce consulting partner ecosystem. **We were recognized by the CRN Tech Elite 250, a definitive list of solution providers with deep technical expertise and premier certifications; and we were the only small business recognized by Forrester as a "Go To" Federal systems integrator for Salesforce. We have a unified working environment and were selected by The Washington Post as one of the Top Workplaces in 2021, 2022, 2023 and 2024.**

We currently have a presence in over 20 Public Sector agencies implementing Salesforce based solutions. Our Salesforce SaaS and PaaS based implementations have included **Inspection Management, Case Management, Grants Management, Contact Centers, Home/Mortgage Counselling, Human Resources, Legacy Application Migrations, Complaints Management, Correspondence Management, Property Management.**



Examples of large Salesforce Contracts we have completed are listed below.

- \$15.3M Award from the Department of Health and Human Services (HHS) Centers for Medicare & Medicaid Services (CMS) for an Enterprise Salesforce deployment
- \$10.6M Award from the Department of Commerce, International Trade Administration (ITA) for Global Salesforce CRM & Case Management
- \$42M Single Award Blanket Purchase Agreement (BPA) from the Consumer Financial Protection Bureau (CFPB) for deployment of enterprise-wide Salesforce applications.
- \$8.7M Single Award Blanket Purchase Agreement (BPA) from the Government Publishing Office (GPO) for Salesforce implementation services for migrating legacy systems
- \$8.4M Award from the Community Development Financial Institutions (CDFI Fund) for the deployment of an enterprise Grants Management program on Salesforce

### Key Advantages of CoreSphere

- Salesforce Crest Partner with 11+ years of State, Federal, Nonprofit, and Commercial implementations
- 66+ certified individuals with over 210 certifications
- 40+ Public Sector enterprise implementations
- Delivered over \$160M in Salesforce services as a Prime Contractor
- 4.9 out of 5 Customer Satisfaction score

### Cloud SynApps

CoreSphere has partnered with Cloud SynApps, a leader in delivering Salesforce Licensing, Permitting and Inspection solutions. Cloud SynApps journey started in 2016, focusing 100% on Salesforce solutions for Public Sector clients. Cloud SynApps provides consulting and implementation services to Government Agencies, Cities, Counties, Municipalities, States/Provinces, and Federal Departments.

### Revolutionizing Industry-Specific Salesforce Implementations with Unmatched Expertise

Cloud SynApps (CSA) has deep roots in Vlocity, an industry cloud pioneer acquired by Salesforce in 2020. Our early focus on industry-specific solutions, particularly in government, allowed us to develop a trusted relationship with Vlocity leadership. This led to opportunities to support large system integrators with challenging Vlocity implementations.

As Vlocity evolved into Salesforce Industries, with Vlocity Government becoming Public Sector Solutions (PSS), CSA relationship with Salesforce strengthened. CSA has contributed significantly to PSS development, including building an ESRI GIS Geospatial Accelerator available on Salesforce AppExchange. CSA CTO is an active advisor on the Salesforce advisory council, influencing PSS certification development.

CSA expertise in PSS sets us apart from other system integrators. We understand the unique technology foundations and data models of different Salesforce clouds, including PSS. This knowledge is crucial for successful architecture design, development, and deployment strategies.

CSA have delivered many Salesforce projects (50+) for various cities, regions, crown corporations, non-profit organizations, and federal governments across Canada and the USA with a **100% success record**. Currently, we are actively engaged and delivering multiple projects with various public sector clients in Canada such as Shared Services Canada (SSC), Invest in Canada (IIC), Innovation, Science & Economic Development Canada (ISED), Canada Deposit Insurance Corporation (CDIC), Natural Resources Canada (NRCan), Ontario Gov't's Ministry of Health, Region of Peel to name a few.

Cloud SynApps has ~65+ FTEs working in North America (US & Canada), ~60+ FTEs in India, and it continues to grow rapidly. We have offices in Canada, the United States, and India. As the 43rd fastest-growing company in Canada and we will continue to grow. Cloud SynApps is a proud Salesforce certified partner with 250+ Salesforce certifications distributed across our associates in 2020, we were listed among the top 25 fastest-growing companies in Canada by Canadian Business along with MacLean's magazine. In 2021 and 2022, we are certified as one of the Great Places to Work by Great Place to Work Institute Inc. and amongst the top 50 (Ranked 43rd) fastest-growing companies in Canada as per The Globe and Mail.

Cloud SynApps invests heavily in building solutions that we know are required by our Public Sector clients repeatedly, incorporating leading practices, as well as innovative approaches. We understand the Digital and IT solution needs of governments with our experienced Subject Matter Experts. We have pre-built assets and accelerators that help expedite the implementation with minimal customization and maximum cost benefit.

## TEAM CORESPHERE

Team CoreSphere consisting of CoreSphere as the prime and CSA as a subcontractor has deep implementation experience and subject matter skills in the following areas:

- Salesforce Platform and Experience Cloud
- Salesforce Service Cloud & Case Management
- Salesforce Public Sector Foundation
- Salesforce Work.com
- Salesforce Health Cloud
- Salesforce OmniStudio
- Salesforce Heroku, Einstein Analytics, Tableau and Mulesoft
- Subject Matter expertise in Case Management, Social Services, Housing, Digital transformation, 311, Grants management, Licensing, Permitting, and Inspections
- AppExchange Solutions: Clarity, Accounting Seed, ServiceMax, Aqxolt
- Customization of the Salesforce platform using Apex classes/triggers, Visualforce, Lightning (LWC, Aura), Apex REST/SOAP Callouts, Custom Apex Web Services, Batch Apex
- Configuration of the Salesforce platform using native Salesforce configuration tools such as OmniStudio, process builder, Workflow Rules, Validation Rules, Reports and Dashboards, Approval Process, Permission sets, Managed and Unmanaged Packages, etc.

For the State of New Hampshire, Team CoreSphere extensive PSS experience, certified associates, and proven implementation methodology ensure that we can deliver optimal value and outcomes for the OPLC's licensing and permitting system modernization project. Our deep understanding of government-specific solutions positions us uniquely to meet New Hampshire's needs efficiently and effectively.

Team CoreSphere extensive experience of developing and implementing Salesforce web-based applications, CRM solutions and service offerings that are interactive, intuitive, and easy-to-use, can be deployed rapidly, customized easily, and integrated with other platforms and enterprise apps are creating a connected experience for our public sector clients/citizens.

## 2. Meeting the Mandatory Expertise or Contractor Qualifications

The selected Vendor must have expertise, experience and/or knowledge, including but not limited to:

### 2.1 Salesforce Public Sector Solution (PSS) Online Licensing and Professional Certification with Salesforce Multi-Tenant Platform with a focus on Omni Studio Frameworks.

Team CoreSphere specializes in leveraging Salesforce Public Sector Solutions (PSS) with a strong focus on OmniStudio Frameworks for licensing, case management, inspections, and enforcement. Our expertise in these areas allows us to deliver efficient, scalable, and customizable solutions for government agencies at all levels.

Key Competencies for Licensing, Case Management, Inspections, and Enforcement include the following:

1. OmniStudio Framework Implementation:
  - OmniScript: Creating guided, interactive experiences for complex licensing applications and inspection processes.
  - FlexCards: Developing dynamic, data-driven interfaces for case management dashboards.
  - DataRaptors: Efficient data transformation and integration for enforcement actions.
  - Integration Procedures: Streamlining backend processes for license approvals and inspection scheduling.
2. Licensing Management:
  - Customized workflows for various license types using OmniScript.
  - Automated license renewal processes with Integration Procedures.
  - Self-service portals for license applications and status checks using Experience Cloud and FlexCards.
3. Case Management:
  - Centralized case tracking and management using FlexCards for quick data visualization.
  - Automated case routing and assignment through Integration Procedures.
  - Document generation and management integrated with OmniScript processes.
4. Inspections:
  - Mobile-friendly inspection forms created with OmniScript for field use.
  - Real-time data capture and sync using DataRaptors.
  - Scheduling and route optimization for inspectors through Integration Procedures.
5. Enforcement:
  - Automated violation detection and case creation using DataRaptors and Integration Procedures.
  - Penalty calculation and assessment workflows with OmniScript.

- Compliance tracking and reporting dashboards using FlexCards.

Our approach combines Salesforce's multi-tenant architecture with OmniStudio Frameworks to deliver secure, scalable, and efficient solutions for public sector agencies. We focus on:

- Modernizing licensing and permitting processes through intuitive, OmniScript-driven interfaces.
- Enhancing case management with dynamic FlexCards and personalized agent workspaces.
- Streamlining inspection processes using mobile-optimized OmniScripts and real-time data sync.
- Improving enforcement actions through automated workflows and data-driven decision support.

By leveraging OmniStudio within Salesforce's PSS platform, Cloud SynApps delivers rapid, cost-effective implementations that meet the unique needs of licensing, case management, inspections, and enforcement agencies while benefiting from the scalability and security of the Salesforce cloud infrastructure.

Certification Area/Name	Number of Certified Associates
Salesforce Platform	170
Salesforce Application Architects	15
Salesforce OmniStudio Developer	35
Salesforce OmniStudio Consultant	6
Public Sector Solutions Accredited Professional	12
Copado Admin and Fundamental	6
Copado Robotic Testing (Automation)	6

**2.2 Experience with Salesforce development and implementation of large complex licensing solutions, with a minimum of two (2) successful Salesforce Public Sector Solutions (PSS) implementations.**

PSS Project #1
<p><b><u>Project: Ministry of Labour, Immigration, Training and Skills Development (MLITSD) - Digital Licensing Application and Processing System</u></b></p> <p>In response to amendments to the Employment Standards Act, the Ontario Ministry of Labour, Immigration, Training, and Skills Development (MLITSD) faced the challenge of implementing a licensing system for Temporary Help Agencies (THAs) and recruiters. This new requirement necessitated a comprehensive online solution to manage the entire licensing process—from application to approval. To address this complexity, we developed a digital licensing platform that would transform outdated manual processes into an efficient, user-friendly service channel. Leveraging our expertise on Salesforce Public Sector Solutions (PSS), we delivered a tailored SaaS solution through a multi-phase project.</p> <p>The system featured an intuitive self-service portal for THAs and recruiters, a robust case management system for MLITSD staff, and secure digital collaboration channels. By focusing on user-centered design,</p>

the platform not only met regulatory requirements but also enhanced the overall user experience. This implementation has revolutionized MLITSD's operations, significantly reducing processing times and improving transparency for applicants while ensuring compliance with the new legislation. As MLITSD continues to refine this innovative system it is well-positioned to adapt to the evolving landscape of temporary employment regulation. This successful project serves as a model for other government agencies looking to modernize their licensing processes and enhance service delivery to constituents, ultimately leading to better outcomes for both the ministry and the agencies it regulates.

#### Key achievements

- **Automation:** Automated the entire licensing process, significantly reducing application processing time and boosting operational efficiency.
- **Transparency and Compliance:** Provided a publicly accessible list of licensed entities, enhancing transparency and promoting compliance.
- **Salesforce PSS Implementation:** CSA utilized Salesforce Public Sector Solutions, including Licensing and Permitting Modules, Service Cloud, and Experience Cloud, to streamline the entire licensing process.
- **Data Management and Security:** Integrated secure payment systems and robust record management capabilities, ensuring data security and ease of access.
- **End-to-End Licensing Workflow:** The solution supported the full lifecycle of the licensing process, from application submission to final issuance, including fee payment, electronic agreement signing, and publication of license holders.
- **Enhanced Functionalities:** The system featured a public directory of licensed entities, secure online payment acceptance, case management, appeals tracking, role-based access, workflow management, document management, and activity tracking.

#### PSS Project #2

##### **Project Name: Ministry of Environment, Conservation and Parks (MECP) Endangered Species Act Portal**

Enforcement of ESA is one of the key responsibilities of MECP – this act protects over 200 endangered species. The ESA provides authorizations (Information Gathering Form (IGF) and permits) and conditional exemptions, allowing certain activities to proceed if they follow certain protective requirements. However, these forms and permits have been paper-based and complex, which is not user-friendly and results in higher application processing times. We implemented a user-friendly web portal and a complex, multi-level branched IGF form on the Salesforce platform. It helped create an intuitive and efficient user interface to enhance the overall user experience and allowed for a comprehensive collection of project-specific data.

Phase 2 of the project demanded AODA (Accessibility for Ontarians with Disabilities Act) and ODS (Ontario Design System) compliant user portal and the creation of a Permit Application Form (PAF) that is intended to assist both proponents and consultants. We are creating a sophisticated PAF using Salesforce Omniscript, tailored to comply with the AODA and ODS standards and French translations. The implementation will lead to a solid foundation, enhancing the efficiency, transparency, and

sustainability of MECP's operations – with a strong digital platform for permit application and a streamlined project auditing process.

**Key Achievements:**

- **Salesforce PSS Implementation:** CSA utilized Salesforce Public Sector Foundations powered by OmniStudio to manage the IGF applications submitted by the proponents. The portal was designed in adherence to Ontario Design Standards, ensuring a user-friendly and accessible interface.
- **End-to-End Digital Transformation:** The solution encompassed a highly complex IGF form built using OmniScript, incorporating robust user management features, validation mechanisms, and error handling to ensure data integrity and adherence to the Accessibility for Ontarians with Disabilities Act (AODA) compliance.
- **Secure Access and Data Protection:** Configured Single Sign-On (SSO) with Azure AD for internal employees and SSO with Public Secure powered by Okta for external users. Salesforce Shield was implemented to encrypt data both at rest and in transit, ensuring high standards of security and privacy.
- **Complex Form Management:** Designed a multi-level branched IGF form using OmniStudio, enabling comprehensive data collection and efficient navigation for both Proponents and Consultants.
- **Streamlined Project Auditing:** Enhanced transparency and reduced administrative burdens by digitizing project auditing and providing clear guidance to Proponents.

### 2.3 Expertise in Agile project management, Agile team working with other Agile teams in an established Agile program.

CoreSphere has an agile project management methodology that is used to implement Salesforce projects. Our overall agile development approach and framework is depicted in the Exhibit below.

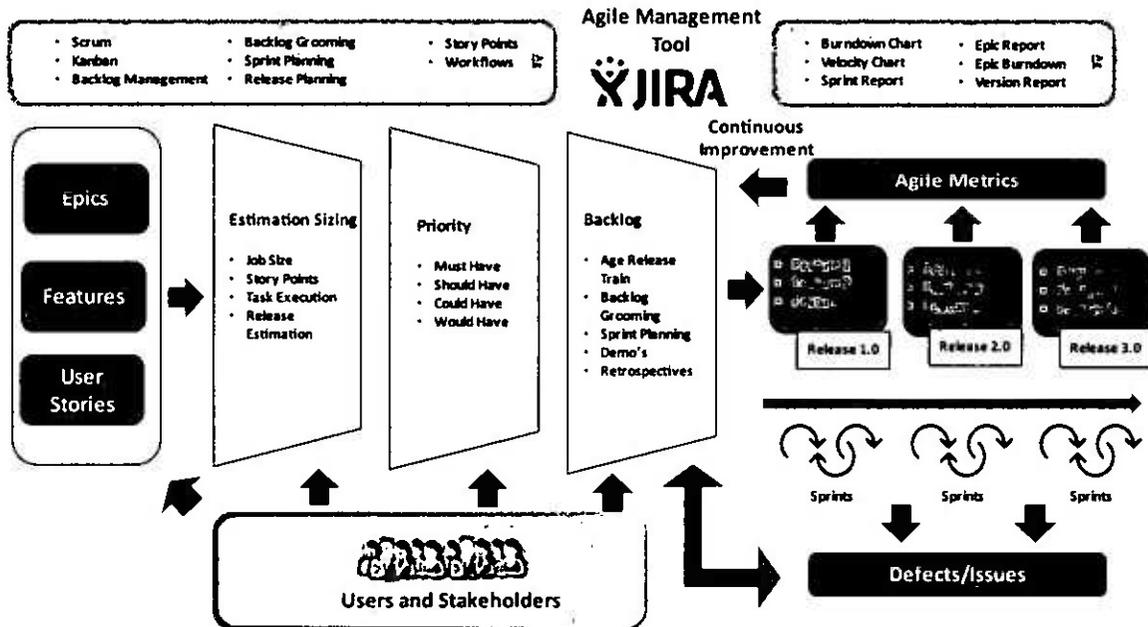


Exhibit 1. Hybrid Agile Process

CoreSphere adheres to Agile best practices and will manage the development via a structured process including but not limited to the following:

- **Backlog Refinement:** An event that happens throughout the product delivery lifecycle. CoreSphere will conduct detailed refinement sessions with our customer counterparts to maintain and update the Project Backlog. As a result of these sessions, the intrinsic value of the story may decompose into multiple acceptance criteria. During the refinement sessions, notes are added as additional nuances to support the acceptance criteria. These acceptance criteria and grooming notes are used by the team to do unit and integration testing at their end and validate the functional value of the user story. The following key definitions and Agile constructs will be used in support of the project and our approach towards User Stories and Requirements Definition.
- **Product Backlog** represents the total population of User Stories that have been defined for the application(s). The backlog is organized by Sprint, Increment and Release, including enhancements and break-fix. The Product Backlog is a living list of User Stories. User Stories for later Increments and Releases are assigned as such for tracking purposes, so that no requirement is lost. It is expected that User Stories in the backlog will have a status of "Release 1" when they are approved and "Deferred" or "Release X" once the decision is made not to immediately assign them to the active Release. These user stories are then reviewed, documented, sized, and prioritized to build a product backlog. The product backlog is then used to build a Sprint and Release plan and is constantly groomed.

- **Epics** - Epics will be developed for initiatives that are large enough such that their development could span multiple releases. There are Business Epics and Architectural Epics (technology solutions).
- **Features** - Epics will be decomposed into Features, the next smallest requirement artifact. They will be sized to fit within one Release. If necessary, a level below Feature, called sub-Feature, which is simply a way of breaking down Features into smaller pieces of work can be defined. Features may or may not be broken down into Sub-Features. A Features and Benefits Matrix (FAB) is used to describe each Feature. Features are typically described using short phrases, for example "Digital signing of an application" and a brief description of the benefit. CoreSphere work with our customers to assign Features to Releases.
- **User Stories** - Features/Sub-Features will be further decomposed into User Stories, which should be constructed in a way that describes intent; for example: "<user role> can <activity> so that..." User Stories are primarily used to describe intent. User Stories do not contain implementation details. User Stories must contain acceptance criteria. Acceptance criteria are sets of requirements that must be completed for the story to be considered finished and to let the State stakeholders know that the story is done. We will capture all Epics, Features/Sub-Features, and User Stories in an Agile project management tool such Jira.
- **Priority**: CoreSphere will facilitate Backlog prioritization with the State. Each user story will be assigned a priority to align with Critical, Must Have, Nice to Have goals of the solution. The priority will be data input to the Sprint Planning and development process.
- **Definition of Ready (DOR)** is based on mutually agreed criteria that a User Story must meet prior to being accepted into a Sprint/Iteration, (i.e. development on a User Story will not be started until these defined criteria are met). The project performs design and development work only after User Stories are documented and approved.
- **The Definition of Done (DOD)** is based on a list of criteria which must be met before a product increment (e.g. User Story) is done. Formal acceptance criteria are defined for each User Story that is assigned to a sprint and acceptance criteria must be met before User Stories are considered done.
- **Product Roadmap Sprint Zero** will serve as the key planning and strategy stage of the project. Using the above defined hybrid agile approach and in addition to the specified deliverables, sprint zero will result in a much more detailed Agile Plan and include a completed product backlog of estimated and prioritized user stories. A cadence of sprint rituals and tools will be established, and core deliverables will be prepared. These deliverables may continue to be refined in future sprints as information is available. A core System architecture and design will be established along with governance and configuration management processes.

**Sprint Planning:** Occurs at the start of the Sprint and defines the work that will be completed and assigned to the resources. As part of the Sprint Planning meeting, the team will estimate the work that needs to be completed.

- **Story Estimation:** We recommend the use of Fibonacci Sequence (1, 2, 3, 5, 8, 13, 21, 34, etc.) for estimation of the relative complexities of the user stories. In addition to complexity, risk and uncertainty are also factored into the estimation.
- **Value Estimation:** Much like complexity estimation around story points, the product owner assigns relative value estimates to the stories. We recommend using a scale based on Low Value, Moderate Value and High value.
- **Team Capacity:** Assuming a 3 Week Sprint, each member of the team has 120 hours for the sprint. That time is usually put into two buckets:
  - (i) Sprint rituals bucket (planning/grooming, review, retrospective, client meetings, admin work, story updating in JIRA etc.)

- (ii) Sprinting ritual. For a 3-week sprint, the sprinting ritual is usually assigned 90 hours (75%) and 30 hours (25%) are assigned to the sprint ritual bucket.
- **Team Velocity:** Identifies the number of Story Points that can be delivered by the team in each sprint. We track sprint metrics such as Point Taken, Points Delivered, Capacity Hours (sprinting capacity only), Hours/Story Point and Story Point variance. By tracking these metrics, Sprint Velocity can be determined over the course of the first few sprints.

**Daily Scrum:** The Scrum team meets every day to share what they worked on the previous day, report blockers/impediments for proactive remediation.

**Sprint Review/Demo:** Occurs at the end of the Sprint to review and demonstrate all the work completed in the Sprint.

**Sprint Retrospective:** Occurs at the end of the Sprint for the team to identify areas of improvement and define action plans accordingly.

## 2.4 Knowledge, communication skills; and systematic capacity to collaborate with programmatic team.

Team CoreSphere will deploy resources that are familiar with the PSS and Licensing implementations. The resources we have provided resumes for have extensive knowledge delivering PSS and Licensing systems. Collaboration is a key aspect of our management strategy. Following are just a few methods Team CoreSphere utilizes to collaborate.

**Daily Stand Up:** A daily stand-up call between Team CoreSphere and our OPLC counterparts will be established. The goal of the daily stand up is to provide an opportunity to team members to provide an update on what they completed the day before, what they will work on today, and any obstacles or “blockers.” The scrum master will maintain the notes on these daily meetings and follow-up on any impediments. Any items that require detailed follow-up are noted and those meetings are scheduled.

**Status Update meeting** are conducted at a cadence that OPLC may choose, usually weekly or bi-weekly. These meetings will be attended by the project management team from Team CoreSphere and OPLC. The Status Meetings agenda will be focused on the status report produced by Team CoreSphere that includes items completed, progress versus the plan, items planned in the upcoming time, open issues, project risks, and/or defects.

**Weekly Status Report:** Team CoreSphere will diligently prepare and submit the Weekly Project Status Report which will list the following:

- Project Health Metrics
- Key accomplishments
- Key issues and their status.
- Deliverable and milestone reporting/Burndown chart.
- Anticipated tasks to be completed in the next week.
- Issues that shall be addressed before proceeding with the next tasks.
- Risk and mitigation planning.

**Monthly Status Report:** The Monthly Status Report will provide updates on all facets of the project from the previous month including but not limited to:

- Estimated efforts/Burndown Chart (hours by activity, for each activity; and timeframe for completion);
- Plans for activities scheduled for the next month.
- Proposed changes to the Project Plan Baseline, if any.
- Status of progress against the Project Baseline.
- Deliverable status, with percentages of completion.
- Updated issues log-including issues encountered, proposed resolutions, and actual resolutions.
- Progress against planned Quality Assurance/Quality Monitoring (QA/QM) metrics.
- Analysis of risks anticipated, proposed mitigation strategies, and resolved risks.
- Updates required in the change management strategy.
- List of change requests-if applicable.
- Anticipated staffing changes.

**Meeting Notes:** are completed within 1 business day of the meeting by Team CoreSphere and sent to the stakeholders for review. Generally, Work Plan updates are completed within 1 business day and sent to the management for review and any additional steps that may be needed to complete and sign-off on any changes.

**As required Team CoreSphere will utilize other collaboration methods to ensure efficient and productive collaboration with OPLC.**

## **2.5 Knowledge of related Salesforce compatible reporting systems (e.g., Tableau);**

Our team possesses extensive experience in implementing and optimizing Salesforce-compatible reporting systems, with a particular focus on Tableau integration. We specialize in creating powerful, data-driven solutions that enhance operational capabilities for public sector and government agencies.

1. Tableau Integration:
  - Seamless connection between Salesforce and Tableau for real-time data visualization.
  - Creation of interactive dashboards that offer deep insights into complex datasets.
  - Customized Tableau reports that leverage Salesforce data for strategic decision-making.
2. Advanced Salesforce Reporting:
  - Expertise in both standard and custom Salesforce reports.
  - Implementation of Salesforce Einstein Analytics for AI-powered insights.
  - Development of analytic snapshots for tracking trends over time.
3. Public Sector Focus:
  - Tailored reporting solutions that address unique government agency requirements.
  - Emphasis on data security and compliance with government regulations.
4. Data Optimization:
  - Streamlining of data processes to improve accessibility and reliability.
  - Data cleansing and preparation to ensure accurate reporting across platforms.
5. Training and Support:
  - Comprehensive training programs for agency staff on using Tableau with Salesforce.
  - Ongoing support for report creation, dashboard maintenance, and system updates.

By leveraging our deep knowledge of Salesforce and Tableau, we create robust reporting ecosystems that enable stakeholders to extract maximum value from their data. Our solutions are designed to improve operational efficiency, facilitate data-driven decision-making, and provide comprehensive insights tailored to the unique needs of each government entity.

**Key Highlights of Our Capabilities:**

- **Standard Reports:** Our team is experienced in configuring Salesforce standard reports to capture and display data directly from the CRM, enabling quick access to performance metrics and customer data which are essential for daily operations.
- **Custom Reports:** Our expertise extends to developing custom reports within Salesforce, tailored to the specific needs of the agency, allowing for deeper analysis and more precise tracking of unique data points.
- **Dashboard Integration:** We integrate Tableau seamlessly with Salesforce to provide interactive dashboards that offer visual representations of data, enhancing the interpretability and immediacy of insights drawn from complex datasets.
- **Analytic Snapshots:** By setting up analytic snapshots in Salesforce, we help agencies track changes and trends over time, facilitating long-term strategic planning and assessment.

**2.6 Experience with system issue reporting and tracking solutions (i.e., Jira, all managed through the State of NH Jira application, and SharePoint sites);**

We have extensive experience in implementing and managing system issue reporting and tracking solutions, notably JIRA and Azure DevOps (ADO), for various clients including public sector agencies. Our proficiency with these platforms enables us to efficiently set up, customize, and manage workflows tailored to the specific needs of our clients, ensuring optimal tracking of issues and project management. By leveraging these tools into the daily operations of agencies, we enhance transparency, accountability, and efficiency in handling project lifecycles and issue resolutions. Our approach is to provide a technical solution and a strategic support to maximize the utility of these tools in complex environments, ensuring that all project stakeholders have visibility and control over tasks.

- To effectively manage system issue reporting and tracking, we will use NH JIRA and SharePoint to create a cohesive and dynamic environment tailored to streamline operations. JIRA serves as the primary tool for logging, tracking, and managing issues and tasks, providing detailed reporting features and customizable workflows that are pivotal for efficient project management. We leverage JIRA's robust capabilities to ensure precise issue categorization, prioritization, and resolution tracking.
- Concurrently, SharePoint acts as a collaborative platform where all project documentation, reports, and communications are centralized. This integration facilitates seamless access to up-to-date project statuses and documentation, enhancing transparency and communication across teams. Team members gain a comprehensive view of project health and progress, fostering a proactive approach to addressing and resolving issues.
- Additionally, we configure alerts and notifications within SharePoint to keep all stakeholders informed of critical updates or changes, ensuring that the resolution process is swift and aligned with project goals.

## **2.7 Experience integrating third-party payment processor into the Salesforce platform and license applications,**

We possess strong experience in integrating third-party payment processors within the Salesforce platform, a capability that enhances both the functionality and efficiency of license applications. Our expertise is demonstrated through a series of successful projects, one notable example being our work for the Ministry of Labor, Immigration, Training and Skills Development (MLITSD).

For MLITSD, we successfully integrated a payment processor, CC Pay, into their existing systems. This integration facilitated seamless payment transactions, ensuring security and compliance with industry standards. Our approach involves comprehensive analysis of the existing system architecture, followed by the implementation of customized solutions that align with specific operational needs and user experiences. We ensure that the payment integration supports all required payment methods and adheres to PCI DSS standards, providing robust encryption and security measures to protect sensitive payment information. By streamlining the payment process, we enhance user satisfaction and operational efficiency, reducing transaction times and improving data accuracy. Additionally, we provide thorough testing and training to ensure that the system is user-friendly and fully functional upon deployment.

## **2.8 Ability to plan and perform data transfer and system interfaces (e.g., existing Legacy and other third-party sources);**

Our team excels in planning and executing complex data transfers and system integrations, particularly for public sector environments involving legacy systems and third-party sources. We employ a comprehensive methodology that begins with a thorough assessment of existing data structures and system interfaces, followed by detailed migration planning to minimize disruption. Our approach leverages advanced tools like Salesforce Data Loader, MuleSoft, and custom ETL processes to ensure efficient and accurate data migration. We design and implement both real-time and batch interfaces, utilizing Salesforce APIs and custom middleware solutions as needed. Our process includes rigorous testing and validation protocols, ensuring data integrity and functional accuracy in the new environment.

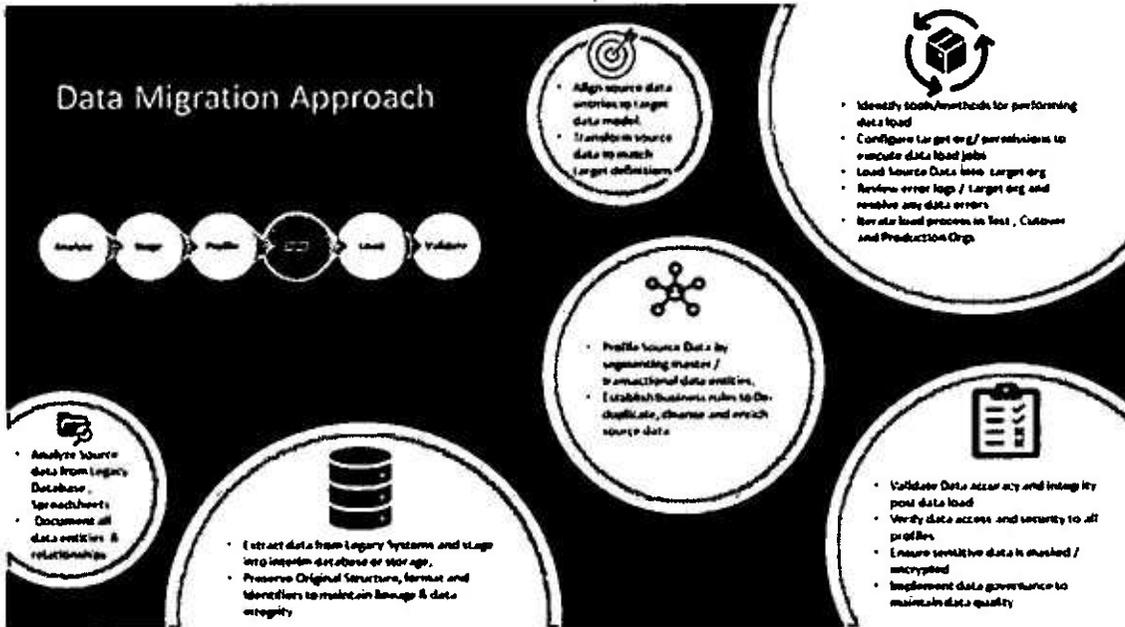
We prioritize security and compliance throughout the migration, implementing robust measures for data protection. Performance optimization is a key focus, with strategies for handling large data volumes and enabling real-time data syncing. We provide comprehensive documentation and conduct thorough training sessions to empower client teams in managing their new systems effectively. Our post-implementation support ensures ongoing data synchronization and interface maintenance. This holistic approach not only facilitates seamless data migration but also enhances functionality and streamlines operations across different platforms, crucial for operational accuracy and informed decision-making in public sector environments.

### **2.8.1 Data Migration Approach**

***Our migration strategy is as follow:***

- ✓ Profile & cleanse source data before migration
- ✓ Implement Data Migration Best Practices
- ✓ Future State Design to address Data model Gaps
- ✓ Recommend Data Quality and Integrity Process /tools
- ✓ Establish Data Transformation / Conversion Rules
- ✓ Ensure Post Migration Data Governance

Over the years we have seen typical salesforce data migration process will encounter one or more of the challenges listed below and requires strategic thinking and planning to succeed. Our Approach is shown in the graphic below.



Here's an overview of the typical steps involved in the data migration process, including conversion design, testing, and data cleansing:

#### Analyze Source data:

- This is the first and critical step that determines the path and complexity of the data migration. Our team will analyze the structure, format, and methods for acquiring various data sources and data entities to be migrated. We will conduct functional review of the data elements, sensitivity, and relevance to target Salesforce application.

#### Stage, Standardize and consolidate Source data:

- The primary focus for this step is to ensure that all source data can be extracted accurately in electronic format and stored in a form on database tables or worksheets stored on the shared drive. We will ensure that data integrity and original format is retained for any future reference.
- Also, our team will determine if the extraction is one-time vs. iterative tasks and design methods/scripts for multiple iterations during the entire data migration process.

#### Data Profiling and Analysis:

- Profile the source data to understand its structure, format, and quality.
- Analyze data dependencies, relationships, and potential issues.
- Identify data cleansing, transformation, and validation requirements.

#### Conversion Design:

- Design the data migration process, including data extraction, transformation, and loading (ETL) procedures.
- Map source data fields to target data fields, considering data format, type, and compatibility.
- Develop data migration scripts, queries, or ETL workflows to extract, transform, and load data.

**Data Cleansing:**

- Cleanse the source data to ensure its accuracy, consistency, and completeness.
- Identify and correct data errors, inconsistencies, duplicates, and missing values.
- Standardize data formats, values, and conventions to align with the target system requirements.
- Apply data quality rules, validation checks, and deduplication techniques as needed.

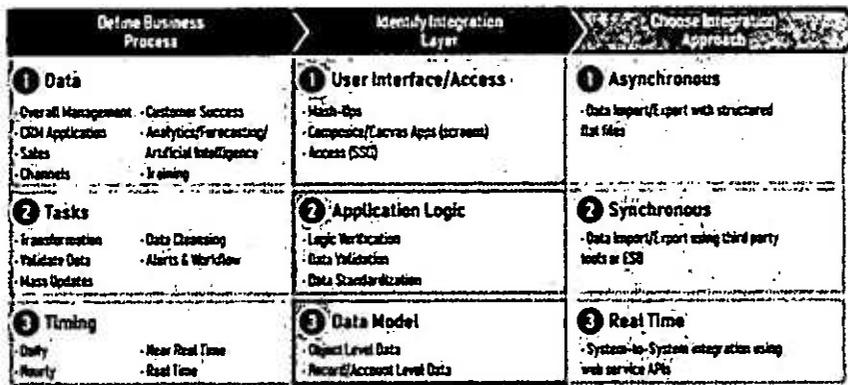
**Testing:**

Develop test cases and scenarios to validate the data migration process. Perform unit testing to ensure the accuracy of data extraction, transformation, and loading. Conduct integration testing to verify data integrity and consistency between source and target systems. Validate data completeness, correctness, and reliability against predefined acceptance criteria. Address any issues, errors, or discrepancies identified during testing and refine the migration process as needed.

**2.8.2 Interfaces**

Team CoreSphere recognizes that Integration with the other systems and bringing data available in external systems to Salesforce platform is very critical. While Salesforce integration with other system is unique process, with its own set of complexities our expertise and proven approach to application modernization guides our customers with the clear goals to improve user adoption and eliminate any challenges associated with the integration with external systems. Team CoreSphere has decision-based approaches to solve the data and system Silos issues as below.

**Integration Decision Process**



- Leverage Data Loader
- Nightly Batch Data Load
- Process Builder Notifications to Stakeholders
- Assumes Low Transformation Needs

**Approach:**

- Team CoreSphere has extensive Salesforce integration experience, delivering connectivity to both on-premises and in-cloud systems such as: financial, ERP, public API's, Microsoft Office 365, Outlook, SharePoint and custom legacy systems. OPLC Operations can choose to seamlessly integrate and configure solutions with existing legacy applications as well as external applications.
- Out-of-the-box, Force.com's REST API and workflow automation allows clients to leverage a simple and lightweight API to access Force.com data, using standard OAuth, together with a choice of data flavors – XML and JSON. The REST API is configured by default to suit the basic CRUD (create, read, update, and delete) operations of data management. Force.com's REST API also makes it possible for CRT to create their own REST-based web services using Apex. It has all

the advantages of the REST architecture, provides the ability to define custom logic and includes automatic argument/object mapping.

**Integration points are classified into three categories:**

- **Data Integration**—These patterns address the requirement to synchronize data that resides in two or more systems so that both systems always contain timely and meaningful data. Data integration is often the simplest type of integration to implement but requires proper information management techniques to make the solution sustainable and cost effective. Such techniques often include aspects of master data management (MDM), data governance, mastering, de-duplication, data flow design, and others.
- **Process Integration**—The patterns in this category address the need for a business process to leverage two or more applications to complete its task. When you implement a solution for this type of integration, the triggering application must call across process boundaries to other applications. Usually, these patterns also include both orchestration (where one application is the central “controller”) and choreography (where applications are multi-participants and there is no central “controller”). These types of integrations can often require complex design, testing, and exception handling requirements. Also, such composite applications are typically more demanding on the underlying systems because they often support long-running transactions, and the ability to report on and/or manage process state.
- **Virtual Integration**—The patterns address the need for a user to view, search, and modify data that’s stored in an external system. When implementing a solution for this type of integration, the triggering application has to call out to other applications and interact with their data in real time. This type of integration removes the need for data replication across systems and means that users always interact with the most current data.

Utilizing these integration strategies Team CoreSphere will ensure we interface with other systems in a seamless manner.

## **2.9 Salesforce PSS cloud to external cloud integrations.**

Our extensive experience in deploying Salesforce Public Sector Solutions (PSS) across various government domains has established us as leaders in enhancing public sector operations through advanced cloud integrations. We leverage Salesforce’s robust API capabilities, MuleSoft, and Salesforce Connect to seamlessly integrate PSS with external cloud systems and legacy platforms. Our projects with agencies like MLITSD, Region of Peel, and the Rhode Island Commission for Human Rights showcase our ability to create tailored solutions that meet diverse governmental needs. We’ve successfully integrated Salesforce PSS with systems such as SAP for financial management, Azure for scalable cloud storage, and ServiceNow for improved service request handling.

Our integrations prioritize real-time data synchronization, stringent security protocols, and regulatory compliance, including FedRAMP standards. We ensure scalability and performance through optimized data processing techniques and design flexible solutions compatible with major government cloud providers. Our structured implementation approach, from requirement assessment to ongoing support, guarantees that integrations not only enhance functionality but also evolve with agency needs. By leveraging Salesforce’s analytics capabilities, we provide actionable insights from integrated data, enabling data-driven decision-making and empowering public sector entities to deliver services more efficiently and transparently.

## 2.10 Single sign-on integration.

We have implemented Single Sign-On (SSO) solutions in complex Salesforce Public Sector environments multiple times. Our expertise with past Public Sector SSO implementations ensures a seamless authentication process that enhances security while improving user experience by allowing users to access multiple applications with a single set of credentials. This is particularly beneficial in environments where users need to interact with multiple systems, as it simplifies the login process and reduces password fatigue.

### Key Highlights of Our SSO Integration Capabilities:

- **Comprehensive SSO Strategy:** Salesforce comes with a tailored SSO strategy that aligns with your organizational security policies and IT infrastructure. This strategy includes assessing the current authentication landscape, identifying the best SSO protocol (e.g., SAML, OAuth, OpenID Connect) for your needs, and planning the integration process.
- **Integration with Identity Providers (IdPs):** Salesforce offers integration capabilities with various leading identity providers such as Okta, Microsoft Azure Active Directory, and Google Identity. This flexibility ensures that organizations can leverage their existing IdP solutions to manage access securely.
- **Enhancing Security Measures:** Security is a paramount concern with SSO solutions. We implement robust security measures including encrypted assertions, secure token services, and multi-factor authentication (MFA) to ensure that the SSO integration does not become a vulnerability.
- **Customization and Scalability:** Understanding that each organization has unique needs, we customize the SSO integration to fit these requirements. Whether it's scaling the solution to handle more users or integrating additional applications down the line, our solutions are built to be flexible and scalable.
- **User Experience Optimization:** By enabling SSO, we significantly enhance the user experience. Users no longer need to remember multiple passwords or go through multiple authentication processes, streamlining their access to the necessary tools and systems.

## 2.11 Provide post go-live warranty support.

Team CoreSphere will warranty, maintain, and support the system post go live. We will ensure that the solution deployed in production is free from defects. If defects are found CoreSphere will fix the defects at our expense. Maintenance and support for the deployed solution has multiple facets, including break-fix, minor enhancements, and seasonal Salesforce upgrades. During this period, Team CoreSphere will perform all maintenance and support as a routine activity, including the establishment and adherence to a software version control and release schedule. Few of the activities that will be performed during system warranty are listed below:

- **Access Support:**
  - **Credentials** – verify requested user's credentials and identity based on established verification procedures.
  - **Restore Access** – once verified access will be restored through password resets, unlocking accounts, or making other changes as needed and notifying the user.
  - **Verify** – once access has been restored; CoreSphere O&M personnel will verify with the end user that access has been restored.

- Application Questions:
  - Research – review available knowledge base and documentation for answers. If not available conduct research and develop response.
  - Notify & verify – update ticket with response answering question and send to the user; Verify with the end user that question has been answered.
  - User Support – based on requests provide support for application use, application navigation, locating training materials, creating reports/dashboards, and any other support needed for the use of Salesforce application.
  - Training Artifacts – where appropriate CoreSphere O&M personnel will update training artifacts to add or refine materials because of providing user support and discovering new information or finding opportunities for improvement.
- Incident Resolution/Tier II Technical Support
 

For all Salesforce Platform related incidents escalated by Tier 1 CoreSphere will:

  - Triage the problem and re-create/duplicate the problem in a sandbox.
  - Diagnosis/perform a root cause analysis.
  - Develop a workaround (if necessary)
  - Develop a resolution by updating configuration in the sandbox or updating code on the integration platform.
  - Test the resolution and conduct regression testing as necessary.
  - Conduct a change management meeting with the stakeholder to describe the resolution or workaround and obtain approval for deploying the resolution to production as appropriate.
  - Document the incident (Date and Time, Duration, Root Cause, Total Outage Time, and other relevant information)
- System Administration / Maintenance
  - Manage and administer all Salesforce Orgs across all MAQCS environments.
  - Monitor, Tune, configure performance of production environments to ensure compliance with SLAs.
  - Patch and Version Management of the Salesforce Orgs.
  - Manage and update security profiles, roles, and privileges.
  - Monitor system usage trends and address any issues preventing system access.
  - Troubleshoot and resolve system accessibility issues.
  - Troubleshoot and resolve other reported errors.
  - Monitor and manage seasonal upgrades released by Salesforce and assist in enabling any relevant capabilities needed by the Department.
  - System Backups and DR Plan Testing Support
  - Release Management
  - Provide system communication on any maintenance windows and downtime.

CoreSphere will establish SLAs during the warranty period. A typical SLA response matrix is provided below.

Severity Level	Response SLA	Description
Level 1 Critical	1 Hour	The entire system or subsystem/module fails or is inoperable with no workaround available.

Level 2 High	4 Hours	A subsystem/module fails or is inoperable, but a workaround is available.
Level 3 Medium	1 - 2 Business Days	The defect does not result in failure, but causes the system to produce incorrect, incomplete, or inconsistent results or the defect impairs the system/data usability.
Level 4 Low	5 Business Days	The defect can be easily worked around to produce desired results. There is no failure or impaired usability. Cosmetic defects fall into this category.

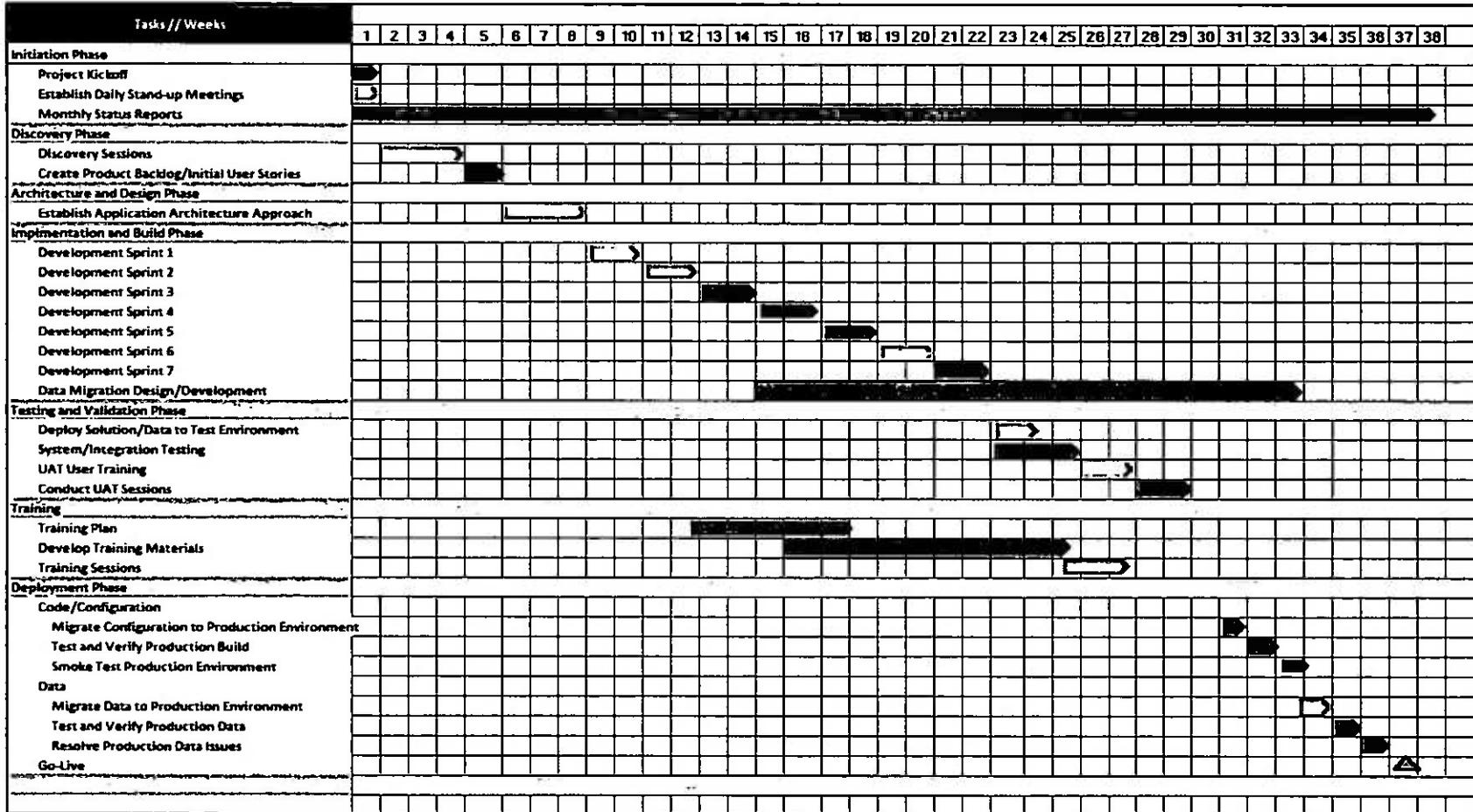
### 3. Project Deliverables and Milestones

Team CoreSphere will complete Phase 2 consisting of taking the MVP developed by Salesforce Professional Services and configure and deliver an MVP for 195 OPLC licenses attached to 57 Merchant User IDs. We will deliver this functionality prior to November 2025. In November 2025 we will work to create scoping and cost model for Case Management, Inspection and Enforcement functionality. This will result in another contract post Phase II completion. CoreSphere will deliver Phase II functionality as follows:

1. Deliver Salesforce License and Certification work as an MVP in compliance with Federal, State and Local laws.
2. Leverage templates created by Salesforce PSS in Phase I to configure new functionality.
3. Ensure "Out of the Box" capabilities to deliver MVPs.
4. Create robust license administration functionality that enables the Licensing Unit to be more productive and efficient during intake, processing and completion of applications.

### 3.1 Sample Work Plan

Based on our understanding of the requirements we have created an implementation approach to implementing Phase II functionality as shown in the work plan below.



### 3.2 Training

Team CoreSphere takes a holistic approach to end-user adoption. Training, end user support, and executive sponsorship are the three main components of our end user adoption strategy, which is geared to familiarize staff with a system, reinforce training, provide the necessary help desk support, and overcome organizational resistance through executive advocacy. CoreSphere’s training methodology considers many variables while developing an end-to-end training plan with the OPLC.



Our training approach for the OPLC promotes high levels of user adoption by engaging users throughout the development lifecycle for incremental learning and knowledge sharing. In this way, we encourage users and stakeholders at-large to take greater ownership of the system and its continued use once the project is implemented. We know that complete and interactive training is key to user adoption and improved productivity. Our expertise in delivering training covers a broad spectrum of technology platforms and accommodates a diverse set of users such as Staff, SMEs, Trainers, and System Administrators and other roles as laid out in the project plan. We will engage throughout the project to develop a tailored training strategy and deliver relevant content in the mode that is most effective.

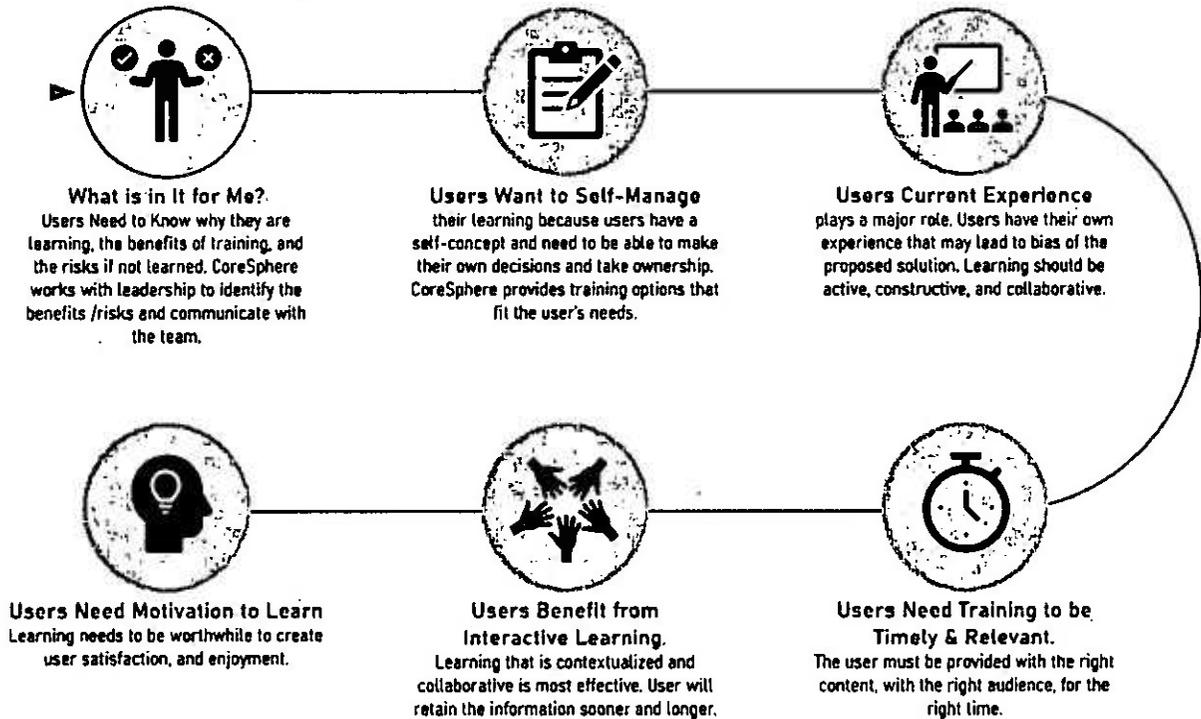


Exhibit 2: CoreSphere Training Approach

CoreSphere will work closely with the OPLC to identify, design, develop and deliver a training structure that best suits organizational training needs. CoreSphere's training methodology provides end-to-end training support for Users, as shown and detailed below.

**Identify:** We engage with stakeholders to understand and document multitude of training needs, training methods required such as on-line, instructor led, self-paced and system integrated help/instructions to perform day-to-day job functions.

**Design:** We customize the training experience for the type of training (technical vs. functional).

**Develop:** We prepare training materials that best fit each training method and are intuitive for training participants.

**Deliver:** While conducting training sessions, we utilize a real-life scenario and interactive approach that delivers substantial benefits to training programs.

**Assess:** Upon successful completion of training, we provide participants with training surveys to gather feedback on training delivery and content.

**Evaluate:** We engage with stakeholders to periodically analyze the feedback and measure the training outcomes using pre-built metrics to evaluate training quality and effectiveness as well as identify any unmet needs.

**Improve:** We incorporate the best practices for continuous improvement with periodic updates to ensure the quality of training methods, content, and delivery.

Instructional design is a key control point of this training plan. The training strategy will consider, among other things, the OPLC's short and long-term training goals, target audiences, training methods, and a training course curriculum, as well as any metrics the OPLC wishes to use to monitor the effectiveness of the training or competency and certification of end users. Our training plan will include a playbook identifying the roll-out timeline for training, roles, and responsibilities in communicating and scheduling training as well as which types of training the various audiences will receive.

CoreSphere offers a wide variety of training modalities and artifacts to reach end-users with different needs as needed and customized based on the assessment results. Training and respective materials are modularized by user role to allow customized training for targeted audiences, while reducing maintenance cost. Users are not trained in system functionality that they will never be required to perform.

**Virtual or Onsite Training:** Organized by user role and/or user experience, this type of training is customized to provide users with the knowledge and skill sets required to navigate the application and perform business functions. We can record these sessions then edit them for distribution.

**End User Training Guide:** Comprehensive training guides that cover all aspects of the project implementation and are modularized by user role to allow customized training for targeted audiences and can be easily updated by assigned stakeholders.

**In-App Guidance:** Salesforce's native training feature called "In-App Guidance" can be leveraged directly within the system and customized with pop-up prompts that can contain written guidance, links, and videos.

**AI Generated Training Videos:** CoreSphere can script training videos that can contain images, videos, text, and are narrated by an AI generated voice.

**Traditional Training Videos:** CoreSphere can script and create videos that can display images, videos, narrated by a CoreSphere team member.

**Quick Reference Guides:** Short, targeted training guides are meant to capture a portion of the existing training that users use most for easy access. These guides can be kept in a shared file location or printed and placed near users' workstations.

**Salesforce Trailhead:** Salesforce has created a community of learning to promote adoption of the platform. Salesforce Trailhead is a complimentary application that allows any user to learn and grow. CoreSphere has simplified the Trailhead learning process and identified the Trailheads most relevant to users and their level by providing a catalog of trails in the table below.

### 3.3 Knowledge Transfer Plan

The knowledge transfer plan serves as the roadmap for knowledge transfer processes and activities. Besides making sure that the ongoing operations team is identified and included early, one of the principles behind the plan is to accelerate involvement. Early in the knowledge transfer process involvement is more focused on keeping the team in the loop rather than trying to transfer skills. The operations team is typically the same team that is supporting the current systems at NH OPLC.

There is usually enough work to do besides adding on new activities. As the transaction date gets closer, legacy activities are waning and there is more capacity to focus on new knowledge and skills.

**Knowledge Transfer Plan Components:** The KT (Knowledge Transfer) Plan will be comprised of hands-on, onsite, and face-to-face training and activities and include the following components:

- Objectives, Relationship to other plans.
- Schedule, Approach, and methods of knowledge transfer
- Resources, Knowledge Transfer Risks,
- Curriculum, Materials,
- Set-up specifications
- Relevant communications
- Monitoring, metrics, and evaluation criteria,
- Any third-party vendor involvement, technical maintenance and operation, and Location of all SOPs, operations manuals for hardware and software products, checklists, etc.
- Team CoreSphere will update the Knowledge Transfer Plan as needed throughout the project.

#### 3.3.1 Knowledge Transfer Phases

Knowledge transfer phases are associated with the timing in which knowledge transfer activities happen. Phases include Pre-Go-Live Training, Post-Go-Live Training, Shadowing, and Turnover. It is expected that DoIT will provide and list of ongoing Agency staff and their roles prior to the start of training.

**Phase 1 - Pre-Go-Live Training:** Ongoing maintenance staff will be included in the Training Plan as stakeholders that require training. The timing of their training will include much, if not all, of the training received by social workers. It is likely that Agency-embedded staff will be available at different times during the system design and development prior to go-live to assist with and/or shadow technical or functional activities. When notified of such an available, the training team will identify a customized set of preparation activities that may include involvement in already scheduled activities or personalized for them.

**Phase 2 – Post-Go-Live Training:** The final handoff to ongoing Agency staff may be longer than pre-go-live training can be retained. To address this, in addition to refresher training from pre-go-live, ongoing maintenance staff will receive training appropriate training in alignment with their roles. This training will include Database, software, and hardware maintenance, Application development/batch support, Architecture design and maintenance, Security maintenance, Testing specifications, User training tools,

methods, materials, and user support functions, System administration, Help Desk, Rules engine, and NH OPLC solution utilized where Agency staff shall be making process, rule, role, or security changes (BPM, rules engine). Training in these areas will be available throughout implementation. It is anticipated that the bulk of the need will be post-go-live.

**Phase 3 – Shadowing:** Within a four to six weeks (depending on complexity of the role) of the project closeout handoff, Agency ongoing operations staff will begin shadowing and taking over activities from CoreSphere staff to the degree that by the last one to two weeks, the Agency staff will have fully taken over actions and responsibilities of their corresponding roles. CoreSphere will be available throughout the shadowing phase for questions. A weekly assessment of readiness to transition will be made for each role with any issues escalated as soon as they are recognized. The end goal is for operations to be seamless to the NH OPLC end user.

**Phase 4 – Turnover:** During project close-out, all materials associated with knowledge transfer (including Standard Operating Procedures (SOPs), Job Aids, checklists, and training materials) will be turned over to the Agency, including the knowledge and skills tracker.

### 3.4 Reporting

Our solution provides a dynamic and comprehensive reporting suite tailored for public sector enterprises, enhancing functionality and accessibility for users. This suite allows for easy downloads of data into Excel or CSV formats, catering to diverse administrative and analytical needs. The range of report categories includes Operational, Management, Data-Statistical, and Financial Reports, each designed to furnish specific insights crucial for effective public management. By leveraging these reporting tools, organizations can streamline processes, make informed decisions, and maintain compliance, all within Salesforce’s secure and scalable environment.

#### Key Reporting Categories:

- **Operational Reports:** We will configure operational reports within Salesforce to support daily license administration by tracking workflow efficiencies and ensuring timely application processing. This setup will enable monitoring of real-time operational metrics, facilitating immediate adjustments to enhance service delivery.
- **Management Reports:** Management reports will be set up to aggregate data over specified time periods, such as case counts and application statuses. This configuration is designed to support strategic planning and performance evaluation, providing leaders with the insights needed to make informed decisions based on current trends and operational outcomes.
- **Data-Statistical Reports:** We will configure reports focused on demographics, trends, and the impacts of specific events. These data-statistical reports are essential for policy formulation, helping to identify patterns and predict future needs or challenges, thus supporting informed decision-making in public sector operations.
- **Financial Reports:** Financial reports will be configured to compile detailed financial data such as collections, payment types, and dates, including reports on open restitution. This setup is critical for fiscal management, ensuring accountability and transparency in financial operations, and facilitating thorough audit and reconciliation processes.

### 3.5 System Conversion and Data Migration

Our comprehensive approach to system conversion and migration from My License Office to Salesforce PSS for the State of New Hampshire's OPLC encompasses a robust data migration strategy, collaborative stakeholder engagement, and detailed planning. We will develop a detailed migration plan that includes thorough analysis of the current system, precise data mapping, and rigorous data cleansing procedures. Our team will work closely with OPLC, System Automation, and State IT resources to ensure seamless coordination throughout the process. Utilizing Salesforce's advanced data migration tools and our expertise, we will execute a phased migration approach, prioritizing critical data and conducting extensive testing at each stage. This includes data integrity checks, functionality testing, and user acceptance testing with OPLC staff.

We will establish Salesforce PSS as the official system of record through final data synchronization, implementation of data governance procedures, and comprehensive training for OPLC staff. Our post-migration support will ensure a smooth transition and address any emerging issues promptly. Throughout the entire process, we will adhere to OPLC-defined requirements for data conversion and migration, ensuring that all necessary information is accurately transferred and validated in the new Salesforce environment.

### 3.6 Milestones

Team CoreSphere work plan has included the following milestones as required.

- State approved and accepted Epics, Stories, User/personas and acceptance criteria for upcoming quarter planning event.
- Bi-weekly sprint product demos .
- Passing state user UAT testing prior to releasing to production.
- Monthly production release and financial reviews.
- Payment calculation and processing .
- eSignature – live in production.
- Tableau – live in production. (Native to Salesforce for data collected via PSS, external data needs to be evaluated for the best vehicle AKA Tableau)
- Permits delivered to production.

### 3.7 Interface Requirements

Team CoreSphere will integrate our solution into other systems as required. At a minimum we will interface with the following:

- NH Department of Safety for Background Checks.
- CE Broker for Continuing Education Requirements.
- Veridoc for License Verification.
- State's payment gateway.

Team CoreSphere has a robust approach to integration.

#### 4. Staff Required with Subject Matter Expertise

Team CoreSphere has reviewed the requirements and has provided the following resumes for the roles listed in the RFQ that may be deployed on the project.

Position	Bid Resource Name	Brief Summary
<b>Solution Architect</b>	Harsha Vardhan	Harsha is a Solution Architect with 11+ years of experience with Salesforce and OmniStudio solutions for multiple industries. Harsha is highly skilled in technical design, solution architecting, configuration, development, administration, and integration of Salesforce with third-party systems. He has also played vital roles in complex transformations, process re-engineering and business process transformation projects. He has led multiple projects as Solution Architect and Technical Architect with extensive hands-on development. He has worked with clients in the Public Sector, Healthcare, Banking, Insurance, Media, Retail, Life Sciences and Communication industries.
<b>Scrum Master</b>	Ananya Saxena	Ananya is a Scrum Master bringing her expertise in Marketing and Finance, along with her experience in the Banking & Fintech Industry. She excels in fast-paced environments and demonstrates a strong professional attitude, leadership skills, effective communication, analytical thinking, problem-solving, and a collaborative teamwork approach.
<b>Business Analyst</b>	Gauri Sharma	Gauri Sharma is a Sr. Associate, Salesforce Business Analyst. Gauri has completed her Bachelor of Arts in Social Psychology with a minor in English Literature. With a passion for public sector initiatives, Gauri is particularly enthusiastic about contributing to the ongoing digitization efforts within government organizations. Known for thriving in fast-paced environments, she brings a professional and motivated attitude to her work. Gauri is recognized for her excellent skills in leadership, communication, analysis, problem-solving, and teamwork.
<b>Tech Lead</b>	Harkirat Grewal	Harkirat is a Salesforce, Salesforce Industries, and Clarity Consultant with over eleven years of experience in solution design, configuration, and administration of Salesforce, Salesforce Industries, and Clarity. She has worked hard to help clients get the most out of their Salesforce CRM by bridging

		business requirements with technical solutions. She is a results-driven, creative thinker with excellent interpersonal, problem-solving, and relationship management skills. She has worked with clients in the Public Sector, Private Sector, Auto Insurance and Chemical Industries.
<b>Developer 1</b>	Rugshan Gnanandram	Rugshan is Salesforce Associate at with expertise in software development. He has a Bachelor of Engineering in Computer Engineering, concentrated in Software Engineering. Throughout his undergrad, he has led many software projects and worked on many others as a hobby. Rugshan is passionate about designing software programs and always striving to improve and expand on his technical and non-technical skills.
<b>Developer 2</b>	Leela Kamal .	Leela is an experienced Salesforce and Vlocity platform developer more than five years of experience in Information technology. She has high proficiency in Salesforce and extensive experience in the areas of requirement gathering, solution designing, application implementation, production support, developing use case diagrams, flowcharts, documentation, unit testing, UAT (User Acceptance Testing), go-live and post go-live support, and conducting knowledge transitions for projects.
<b>Developer 3</b>	Dheeraj Kumar	Dheeraj is a skilled Salesforce Developer at with extensive experience across multiple Salesforce.com projects, including roles as both a Salesforce Developer and OmniStudio Developer. He brings a comprehensive background in planning, analysis, design, building, testing, deployment, and training, showcasing his versatility across all phases of the development lifecycle. With strong expertise in Salesforce Platform development, Dheeraj is proficient in administration, configuration, implementation, and support of Salesforce CRM, utilizing the Apex programming language and the Force.com platform. He holds several Salesforce and Vlocity certifications, demonstrating his commitment to maintaining high standards of proficiency and knowledge in Salesforce technologies.
<b>Developer 4</b>	Doan Nguyen	Doan Nguyen is a Developer with expertise in software and hardware development. She has a Bachelor of Engineering degree with experience in

		app and web development, logic gates, and hardware implementation. Doan is a young, ambitious and motivated individual who delivers excellent results to achieve customer satisfaction.
<b>Release Manager</b>	Akrati Saxena	Akrati is a certified Salesforce and Vlocity platform developer with 15 years of experience in IT including Salesforce and SAP. She is an expert in requirement gathering, design and build enablement, application implementation, application maintenance and production support, project management, release management, unit testing, UAT, go-live, post-go-live support, and conducting knowledge transitions for projects.
<b>QA</b>	Rashmitha Shetty	Salesforce QA Specialist with expertise in Business Process and Software Engineering Methodologies. Demonstrates a strong foundation in testing, analyzing, and optimizing quality assurance processes within the Salesforce ecosystem. A highly motivated individual ready to tackle challenges, pursue growth opportunities, and excel in the dynamic and evolving Salesforce industry environment.

## 4.1 Solution Architect – Harsha Vardhan



**Harsha Vardhan**

Solution Architect

### Salesforce Skills

OmniStudio, Sales Cloud, Service Cloud, Marketing Cloud, Health Cloud solutions, Community Cloud, AppExchange Product Development, UI/UX Expertise, Classic/Lightning, Expertise on force.com APIs (Application Programming Interface), Chatter API (Application Programming Interface), Security Controls, Reports and Dashboards, Chatter, SSO

### Certifications

- Salesforce Certified Administrator
- Salesforce Certified Platform Developer I
- Salesforce Certified Platform Developer II
- Salesforce Certified Integration Architecture Designer
- OmniStudio/Vlocity Certified Developer

### Tools / Modules:

Languages: Apex, Visualforce, AURA framework, Lightning Web Components, Front-end Languages, Omnistudio

Integration: Web-services (SOAP (Simple Object Access Protocol)), REST, Outbound Message, ETL (extraction, Migration and Load) Interfaces, Payments

Web Technologies : HTML5, CSS 3, JAVA Script, JSON, jQuery

Tools : IDE (Eclipse), Git (Version Control), Dataloader.IO, ANT, Visual Studio, Jenkins Web : HTML, XML, CSS, JAVA Script, JSON, Visual force, LWC (Lightning Web Components), Aura Education

### Education

Bachelor's degree in computer science engineering

### Languages

English, Hindi, Telugu, Kannada

## Professional Background

Harsha is a Solution Architect with 11+ years of experience with Salesforce and OmniStudio solutions for multiple industries. Harsha is highly skilled in technical design, solution architecting, configuration, development, administration, and integration of Salesforce with third-party systems. He has also played vital roles in complex transformations, process re-engineering and business process transformation projects. He has led multiple projects as Solution Architect and Technical Architect with extensive hands-on development. He has worked with clients in the Public Sector, Healthcare, Banking, Insurance, Media, Retail, Life Sciences and Communication industries.

## Project Experience

### Principal Consultant | Oct 2020 - Present

#### NRIP – (Nov 2023 - Present)

**Project Description** – This engagement is to digitize multiple business lines of the ministry. Main focus is to optimize the current implementation, update the front-end components to meet the design standards and implement the new set of digitization requirements.

**Project Role** – Technical Architect

**Key Tasks and Responsibilities:**

**Participation in Discovery Sessions:**

- Actively engaged in comprehensive discovery sessions to thoroughly understand and analyze client requirements.

**Solution Architecture Provision:**

- Offered a strategic and comprehensive overall architecture for the proposed solution.

**Collaboration with Client Team and Business Analysts:**

- Fostered strong collaboration with the client team and business analysts to ensure precise and unambiguous requirements for the development team.

**Organization of Regular Checkpoint Meetings:**

- Orchestrated regular checkpoint meetings with the development team, ensuring adherence to industry best practices throughout the project lifecycle.

**Ensuring Quality Delivery:**

- Assiduously ensured the delivery of high-quality solutions by implementing rigorous quality assurance measures and standards.

#### MLITSD – Licensing application (Jan 2023 – Oct 2023)

**Project Description** – This engagement is to build digital solution for the Licensing functionalities of the ministry. This solution covers a customer facing community with smart forms enabled for the intake of licensing applications. And the community has Single Sign-On enabled with the ministry's website. We have followed all the ministry's design standards in building this solution. Besides the customer facing

community, we have built a detailed review workflow which makes use of Salesforce's automation capabilities to minimize manual efforts and automated calculations.

#### Project Role – Solution Architect

#### Key Tasks and Responsibilities:

##### Participation in Discovery Sessions:

- Actively engaged in comprehensive discovery sessions to thoroughly understand and analyze client requirements.

##### Solution Architecture Provision:

- Offered a strategic and comprehensive overall architecture for the proposed solution.

##### Collaboration with Client Team and Business Analysts:

- Fostered strong collaboration with the client team and business analysts to ensure precise and unambiguous requirements for the development team.

##### Organization of Regular Checkpoint Meetings:

- Orchestrated regular checkpoint meetings with the development team, ensuring adherence to industry best practices throughout the project lifecycle.

##### Ensuring Quality Delivery:

- Assiduously ensured the delivery of high-quality solutions by implementing rigorous quality assurance measures and standards.

#### **Salesforce – Esri Integration (Sep 2022 – Jan 2023)**

**Project Description** – This engagement was to enable Salesforce customers with a product offering to use Esri features in the permitting applications. This application offers features such as plotting the location on Esri map as a polygon, ability to draw multiple polygons, book a location for multiple timeslots, etc.

#### Project Role – Solution Architect

#### Key Tasks and Responsibilities:

##### Technical Solution Design Leadership:

- **Strategic Formulation:** Led the development of a comprehensive and strategic technical solution design for the engagement, aligning it with project objectives and client requirements.
- **Innovative Approaches:** Introduced innovative approaches and solutions to enhance the technical design, promoting efficiency and scalability.

##### Technical Design Support:

- **Collaborative Refinement:** Collaborated closely with the technical lead to refine and optimize the design, leveraging combined expertise for a robust and technically superior solution.
- **Problem Resolution:** Proactively identified and addressed design challenges, ensuring a seamless integration of technical components.

Collaboration with Client Team and Business Analysts:

- Engaged extensively with the client team and business analysts to clarify project requirements, fostering a shared understanding among all stakeholders.
- Actively sought and integrated feedback from clients and business analysts, ensuring alignment with evolving project needs.

Checkpoint Meeting Organization:

- Established and maintained a structured review process through regular checkpoint meetings with the development team, ensuring milestones were met efficiently.
- Enforced adherence to industry best practices during checkpoint meetings, promoting consistency and quality in development efforts.

Quality Assurance Oversight:

- Rigorous Quality Measures: Implemented and monitored rigorous quality assurance measures throughout the development lifecycle, guaranteeing the delivery of high-quality solutions.
- Continuous Improvement: Fostered a culture of continuous improvement, conducting thorough evaluations to identify areas for enhancement and optimization in the delivery process.

**Region of Peel, ON – Meter Management (Sept 2021 – May 2022)**

Project Description – This engagement was to address the challenges that the client team had been experiencing with their meter connection management application. We have solved major performance issues that the client had been experiencing because of the complex logic and bulkiness of the application.

Project Role – Solution Architect

Key Tasks and Responsibilities:

Solution Design Leadership:

- Spearheaded the technical solution design, providing a strategic roadmap for the entire engagement.
- Ensured alignment of technical solutions with project objectives and client expectations.

Team Management:

- Effectively managed a team of developers, fostering collaboration and synergy within the group.
- Implemented strategies to optimize team performance and enhance project delivery efficiency.

Code Quality Assurance:

- Played a key role in the code review process, actively contributing to the enhancement of code quality.
- Implemented and enforced coding standards to maintain a high level of code integrity.
- Collaboration and Documentation

Requirements Clarification:

- Collaborated closely with the client team and business analysts to facilitate clear and comprehensive requirement understanding.
- Established effective communication channels to address any gaps or uncertainties in project requirements.

**Document Preparation Guidance:**

- Provided guidance and oversight in the preparation of technical design documents and deployment documents.
- Ensured documentation completeness, clarity, and adherence to project standards.

**Best Practices Oversight:**

- Organized and led regular checkpoint meetings with the development team to enforce adherence to best practices.
- Conducted training sessions to keep the team updated on evolving best practices and industry standards.

**Region of Peel, ON – Affordable Social Housing (Oct 2020 – Sept 2021)**

**Project Description** – This engagement is to build an end-to-end solution for affordable social housing. This application starts from a citizen coming into the portal and raising a request for affordable housing and end with placing the applicants in a queue, connecting them to the registered housing providers and placing them with a discounted rent at a home.

**Project Role – Solution Architect**

**Key Tasks and Responsibilities:**

**Strategic Solution Design:**

- Spearheaded the technical solution design, mapping out a comprehensive and strategic plan for the entire engagement.
- Ensured the alignment of technical solutions with project objectives, fostering innovation and efficiency.

**Team Management for Successful Delivery:**

- Effectively managed a team of developers, employing leadership strategies to achieve successful project delivery.
- Implemented performance optimization techniques, enhancing collaboration and overall team productivity.

**Code Quality Contribution:**

- Actively contributed to the code review process, emphasizing the importance of code quality within the development team.
- Provided constructive feedback and implemented improvements to elevate the overall code standard.

**Client and Requirement Alignment:**

- Collaborated closely with the client team and business analysts to ensure a clear understanding of project requirements.
- Facilitated effective communication channels, addressing any ambiguities or gaps in the project specifications.

**Guidance in Document Preparation:**

- Provided hands-on guidance to the team in the preparation of technical design documents and deployment documents.
- Ensured that documentation was comprehensive, coherent, and aligned with project standards.

**Best Practices Enforcement:**

- Organized regular checkpoint meetings with the development team to ensure strict adherence to best practices.
- Conducted training sessions to keep the team updated on evolving best practices, fostering a culture of continuous improvement.

**Leading Insurance Company, ON (Sept 2019 – Oct 2020)**

Project Description – Rebuilt RSA’s existing Broker and Underwriter applications using Vlocity from Angular. This makes it easy to maintain and it is easily scalable for admins. This project included communities and salesforce internal applications for quoting an insurance policy. A fit-gap analysis was performed, and a solution was designed for existing functionality as well as enhancements, which are to fill the gaps in the existing application. The application is currently being developed.

**Project Role – Integration Specialist**

**Key Tasks and Responsibilities:**

**Integration Functionality Design and Development:**

- Designed and developed integration-related functionalities from Salesforce, leveraging Omnistudio integration procedures.
- Ensured seamless data flow and connectivity between Salesforce and other systems through efficient integration processes.

**Third-Party Connector Collaboration:**

- Organized regular connects with the Third-party connector team to ensure secure and reliable connectivity.
- Fostered collaboration and communication channels to address any connectivity challenges and optimize integration processes.

**Client Requirement Gathering:**

- Actively participated in requirement gathering connects with the client team, ensuring a thorough understanding of project specifications.
- Facilitated effective communication to capture and document client requirements for integration functionalities.

**Salesforce and Vlocity Solution Contribution:**

- Contributed to Salesforce and Vlocity solution development, aligning technical solutions with project objectives.
- Provided expertise in the development of solutions, ensuring the Salesforce and Vlocity platforms met project requirements.

**Deployment Collaboration:**

- Collaborated with the team in deployment activities, ensuring a smooth transition from development to production environments.
- Implemented deployment best practices to minimize risks and optimize the efficiency of the deployment process.

**Integration Front Leadership:**

- Led the integration front of the application, overseeing the implementation and performance of integration processes.
- Implemented strategies to enhance the efficiency and reliability of integration functionalities within the application.

**Regional Municipality, Oakville, ON (May 2019 - August 2019)**

Project Description – Implemented community registration page with GIS address search functionality embedded in it. Automated processes to synchronize changes between community users and associated Customer Account. The address search uses integration with Esri system. Implemented real time synchronization of user data changes between salesforce and Town of Oakville's other databases.

**Project Role – Technical Architect**

**Key Tasks and Responsibilities:**

**Client Requirement Gathering:**

- Gathered requirements directly from the client IT team, ensuring a clear understanding of their specific needs and expectations.
- Conducted thorough requirement gathering sessions to capture detailed insights and specifications from the client.

**Functionality and Interface Design and Build:**

- Designed and built functionalities and interfaces, translating client requirements into tangible solutions.
- Ensured the development of user-friendly and effective features that aligned with the project objectives.

**Unit Testing and Deployment Leadership:**

- Led unit tests and deployment activities, ensuring the robustness and reliability of developed functionalities.
- Implemented effective testing strategies and deployment procedures to guarantee smooth transitions between development phases.

**Real-time GIS Integration:**

- Integrated the community sign-up page with real-time Esri GIS addresses, enhancing the accuracy and relevance of location data.
- Implemented seamless integration processes to facilitate real-time updates and data synchronization.

#### System Gap Analysis and Communication:

- Analyzed and identified gaps in the system, effectively communicating findings to the client team.
- Provided clear and concise reports on system gaps, facilitating collaborative problem-solving and improvement initiatives.

#### Client Development and Business Team Collaboration:

- Organized interactions with the client's development team and business teams to understand existing integrations to and from Salesforce.
- Fostered open communication channels to gain insights into current integrations, ensuring a comprehensive understanding for future developments.

#### Regional Municipality, Brampton, ON (Sept 2018 – Apr 2019)

Project Description – Implemented a fully equipped application for Region of Peel to handle development charges from developers and homeowners. The application facilitates Order management, payment management, approval process and automated processes. The application includes functionalities facing internal salesforce users and customers facing community portal.

#### Project Role – Solution Architect

##### Key Tasks and Responsibilities:

##### Business Requirement Analysis:

- Gathered requirements from the business team and conducted thorough analysis in the initial phases of the solution.
- Collaborated with stakeholders to ensure a comprehensive understanding of business needs and objectives.

##### Solution Design Based on Business Requirements:

- Designed the solution based on the requirements gathered from the business team, aiming for the development of a best-fit solution.
- Ensured that the proposed solution aligned with business objectives and addressed specific needs identified during requirement gathering.

##### Technical Team Leadership:

- Led the technical team in building the solution, providing guidance and direction throughout the development process.
- Implemented strategies to optimize team performance, ensuring efficient and effective solution development.

##### Code and Functional Reviews:

- Conducted code and functional reviews to ensure the application's quality and scalability.
- Implemented rigorous review processes to identify and address any issues, ensuring a robust and high-quality application.

**Client IT Team Coordination in Deployments:**

- Coordinated with the client IT team in deployments, ensuring smooth data migration and successful implementation of the developed solution.
- Facilitated collaboration between teams to minimize disruptions and optimize the deployment process.

**Functional Training Meetings:**

- Conducted functional training meetings with business teams, ensuring that end-users were well-equipped to effectively use the implemented solution.
- Provided comprehensive training sessions to enhance user adoption and maximize the benefits of the developed solution.

**Price Waterhouse Coopers, Bengaluru (Bangalore), India**

NBC Universal (Apr 2018 – Aug 2018)

**Project Description – Application Development & Maintenance on Force.com Platform.** A Media & Entertainment firm with work value USD 33B+ NBC Universal invited PwC to plan, build & maintain CRM (Customer Relationship Management) services including end user experience. The solution landscape involved enabling Salesforce Sales Cloud, Communities, and some Custom functionalities. One of the major implementations is automating the production approvals. This process starts from a Licensee choosing a Factory to start their production and runs through product selection to manufacture in the specific Factory and finally different Audit processes, Negotiations, and approvals.

**Project Role – Salesforce Developer**

**Key Tasks and Responsibilities:**

- Partnered with client's Enterprise IT team and business team in initial phases of solution.
- Provided guidance on technology related matters to the team.
- Responsible & accountable for complete delivery.
- Provided specialized systems knowledge to assist with problem solving, application development and maintenance.
- Enabled productivity improvement for maintenance track by having the team automate mundane & repetitive tasks.

**Deloitte**

**Anthem Insurance, USA (Apr 2017 – Apr 2018)**

**Project Description – Application Development –** An American health insurance company with value USD 91B+. Implemented integration between Anthem's Salesforce and Quoting systems. Mutual authentication mechanism used to establish tight security in this integration. REST and SOAP APIs are leveraged in implementing this solution.

### **Project Role – Salesforce Developer**

#### **Key Tasks and Responsibilities:**

- Implement multiple system integration as the integration architect. Provided specialized systems knowledge to assist with problem solving, application development and maintenance.
- Co-ordinated with various vendors to establish secured connection while integrating systems.
- Assisted onshore in planning the release & overall program.
- Managed end-to-end solution delivery.

## 4.2 Scrum Master - Ananya Saxena



**Ananya Saxena**

Scrum Master

### Certifications

- Salesforce Certified Administrator
- Salesforce Certified Business Analyst
- Project Management Professional
- Certified Scrum Master
- Certified Scrum Product Owner
- AWS Cloud Practitioner

### Salesforce Skills

- MS Office Suite, Agile Methodology
- Clarity, Service Now, Jira

### Education

- MBA- ICFAI University
- BCOM- Barkatullah University

### Languages

English

### Professional Background

Ananya is a Scrum Master bringing her expertise in Marketing and Finance, along with her experience in the Banking & Fintech Industry. She excels in fast-paced environments and demonstrates a strong professional attitude, leadership skills, effective communication, analytical thinking, problem-solving, and a collaborative teamwork approach.

### Project Experience

Cloud SynApps Inc. Business Analyst (July 2024 – Present)

**Region of Halton-** Re-platforming of 8 services offered by the Region of Halton into Salesforce.

**Project Role –** Business Analyst

**Key Tasks and Responsibilities:**

**Discovery Sessions Facilitation**

- Orchestrated and led comprehensive discovery sessions, fostering collaborative engagement with stakeholders to elicit and refine project requirements and objectives.

### **User Story Development**

- Generated detailed and actionable user stories, capturing user needs, preferences, and functional requirements to drive solution design and development.

### **Business Flow Diagram Creation**

- Produced intricate and informative business flow diagrams, visually mapping out processes and workflows to enhance understanding and facilitate informed decision-making.

### **Solution Demonstration**

- Conducted polished and insightful demonstrations of implemented solutions, showcasing functionality and features to stakeholders and end-users, ensuring alignment with project goals and requirements.

### **User Training Coordination**

- Coordinated and facilitated user training sessions, equipping stakeholders and end-users with the necessary knowledge and skills to effectively utilize and maximize the benefits of the implemented solutions.

### **Collaboration with Development Team**

- Engaged in close collaboration with developers, providing comprehensive requirements documentation and offering clarifications to ensure accurate implementation of business needs and objectives.

### **Quality Assurance Coordination**

- Facilitated seamless coordination with Quality Assurance (QA) teams, participating in review processes and providing feedback to ensure that developed solutions meet specified requirements and quality standards.

## **Fidelity Information Services (Jun 2020 – Dec 2023)**

### **UVN Ring Removal Project**

#### **Project Role – Business Analyst**

#### **Key Tasks and Responsibilities:**

- Gathering requirements from clients and clarifying any gaps in communication to ensure successful understanding of pain points.
- Leading daily scrum calls with clients, providing updates and answering any relevant questions.
- Creating user stories that satisfy client requirements, then meeting with the clients to approve such stories.
- Consistently communicating with the internal development team to ensure the delivered product is of highest quality.
- Testing the working product throughout its lifecycle to ensure that it meets the standards of the client.

### **CISCO Ethernet Ring Protection Project**

*Configuration and installation of ERPS on a CISCO switch to provide protection and recovery switching.*

- Successfully led the requirement gathering sessions and assessment of current switches with the technical team.
- Defined scope, created user stories

- Preparation, testing of ERP system, implementation of the ERP system fully with minimum possible downtime to support the project manager

#### **ECT SDWAN Roll Out**

*This project was initiated to securely connect the offices/ people to applications.*

- Collected requirements, identified site profiles and selected proof of concept sites
- Led the initiative to transition networking technology from MPLS to DIA/SDWAN, optimizing the entire network.
- Demonstrated strong collaboration across different time zones

#### **Centre for Skills Development (Feb 2019 -Jun 2020)**

**Project Description- Data Migration Project**

**Project Role- Business Analyst**

##### **Key Tasks and Responsibilities:**

- Managed data migration workstream within the established project budget and advised Sr. Project Manager of potential deviation
- Collaborated with business stakeholders and IT technical solution teams to map technical requirements to business specifications.
- Provided timely status reporting and ensuring a comprehensive understanding of scope.
- Implemented opportunity and needs assessments, identifying and collaborating with Product Managers on product enhancements.
- As part of the project closure, evaluate and make recommendations for future improvements and business units.

#### **Comnet Solutions Pvt. Ltd. Apr. 2017-Dec 2018**

**Project Description- Digital Transformation Project**

**Project Role- Business Analyst**

##### **Key Tasks and Responsibilities:**

- Worked on data migration project to ensure the seamless migration of data from legacy system to cloud.
- Supported the Project Manager in understanding the current state, defining the migration study, preparing, migrating and validating
- Aligned with internal and external stakeholders to better understand, interpret, analyze, and draw meaningful conclusions from datasets.

Managed Power BI data integrity validation, ongoing maintenance, and data governance

### 4.3 Business Analyst - Gauri Sharma



**Gauri Sharma**  
Business Analyst

#### Certifications

- Salesforce Certified Administrator
- Salesforce Certified Omni Studio Consultant
- Salesforce Certified Business Analyst

#### Salesforce Core Skills:

- Salesforce Administrator, Reports, Dashboards, OmniStudio Consultant.

#### Education

- Bachelor of Arts Social Psychology

#### Languages

- English, Hindi

#### Professional Background

Gauri Sharma is a Sr. Associate, Salesforce Business Analyst. Gauri has completed her Bachelor of Arts in Social Psychology with a minor in English Literature. With a passion for public sector initiatives, Gauri is particularly enthusiastic about contributing to the ongoing digitization efforts within government organizations. Known for thriving in fast-paced environments, she brings a professional and motivated attitude to her work. Gauri is recognized for her excellent skills in leadership, communication, analysis, problem-solving, and teamwork.

#### Select Projects Experience

#### Roles and Responsibilities

- Work with clients and stakeholders to deliver high-quality Salesforce solutions.
- Collaborate with various teams to ensure seamless development and testing.
- Serve as the primary point of contact between business and internal personnel, addressing inquiries and clarifying project requirements.
- Elicit project requirements, and develop user stories, features, and epics.
- Conduct sessions with the business, including demos, training sessions

- Create essential project documentation and deliverables (ex. Training material, tracking documentation, etc.)

**Region of Peel | Digitization of Covid-19 related applications and order forms for health organizations. (August 2023 – September 2023)**

Project Role – Business Analyst

Client Segment: Public Sector

Key Tasks and Responsibilities:

- Engaged in daily scrum calls with clients, offering progress updates and addressing relevant inquiries.
- Consistent tracking of progress, bugs, stories, and requirements
- Ensured consistent communication with the internal functional team and business team to guarantee a thorough understanding and accurate implementation of all requirements.
- Conducted client demos and collected feedback on the developed functions.
- Created training material and led Train the Trainer sessions.

**Ministry of Labour, Immigration, Training, and Skills Development (MLITSD) | Licencing and case management solution for MLITSD to facilitate the new requirement for Temporary Help and Recruitment agencies to be licenced. (March 2023 – February 2024)**

Project Role – Business Analyst

Client Segment: Public Sector

Key Tasks and Responsibilities

- Engaged in daily scrum calls with clients, offering progress updates and addressing relevant inquiries.
- Developed detailed user stories and met continuously with stakeholders for requirement gathering and user story development.
- Maintained a consistent communication line between multiple teams to guarantee a thorough understanding and accurate implementation of all requirements.
- Prepared Excel documents for various purposes, including data mapping, testing, and bug tracking.
- Identified bugs through testing and worked with the technical team to ensure they were resolved.
- Formulated stories and proof-of-concepts to fulfill client needs.
- Conducted client demos, developed training material and led knowledge transfer sessions.

Worked with internal teams to ensure the standards of AODA (Accessibility for Ontarians with Disabilities Act) compliance were met.

#### 4.4 Tech Lead - Harkirat Grewal



### Harkirat Grewal

#### Tech Lead

##### Certifications

- Certified Scrum Master (CSM)
- Certified Scrum Product Owner (CSPO)
- Salesforce Certified Platform Developer I
- Salesforce Certified OmniStudio Developer
- Salesforce Certified Platform App Builder
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified OmniStudio Consultant
- Salesforce Certified Experience Cloud Consultant
- Salesforce Certified Pardot Specialist
- Salesforce Certified Marketing Cloud Email Specialist
- Salesforce Certified Administrator
- BasicGov (Clarity) Foundation Certification
- COPADO Certified Fundamentals I
- IBM Certified SOA Fundamentals Associate
- Sun Certified Java Associate Programmer
- Certified HP Quality Center 9.2 Software Professional
- ISEB/ISTQB Intermediate Level Certificate in Software Testing

##### Technical and Functional Skills

###### Salesforce Core Skills:

- Salesforce Industries, Sales Cloud, Service Cloud, Experience Cloud, Partner Community, CRM Analytics, Industry Cloud, Einstein Analytics.

###### Tools / Modules:

- **Cloud:** Service, App Builder, Marketing Email, Pardot. Classic/Lightning UI; Workflow Rules, Approval Processes, Process Builder, Validation Rules, Security Controls, Reports and Dashboards, Knowledge management, Email-to-Case
- Data Loader, Workbench, SQL, SOQL, Visual Studio Code.

###### Architectural Skills:

- Able to design future state technical diagrams and data models, Knowledge of salesforce best practices and governance rules.

## Education

- 2003 – 2005: Punjab Technical University, India- master's in information technology
- 1998 – 2002: Punjab Agricultural University, India - bachelor's in science

## Professional Background

Harkirat is a Salesforce, Salesforce Industries, and Clarity Consultant with over eleven years of experience in solution design, configuration, and administration of Salesforce, Salesforce Industries, and Clarity. She has worked hard to help clients get the most out of their Salesforce CRM by bridging business requirements with technical solutions. She is a results-driven, creative thinker with excellent interpersonal, problem-solving, and relationship management skills. She has worked with clients in the Public Sector, Private Sector, Auto Insurance and Chemical Industries.

### **MECP - Digital Forms, MECP (March 2023 – Present)**

**Project Description** - This engagement is to digitize multiple business lines of the ministry. Main focus is to optimize the current implementation, update the front-end components to meet the design standards and implement the new set of digitization requirements.

**Project Role** – Project Lead, Salesforce/OmniStudio Developer

**Key Tasks and Responsibilities:**

**Participation in Discovery Sessions:**

- Engaged with Client Organizations to define and drive policies/guidelines related to Business Transformations, Business Architecture, and Data Architecture.
- Demonstrated expertise in SDLC, specifically emphasizing agile development processes.
- Applied Agile Scrum methodologies extensively in project execution.

### **Solutions and Delivery:**

- Implemented The Public Sector Solution, OmniStudio and Experience Cloud.
- Created AODA compliant Digital Forms by designing and developing OmniStudio OmniScripts, Data Raptors, and Integration Procedures.
- Apex Manage sharing for Third Party Representation.
- Developed solutions and proofs-of-concept to satisfy client requirements.
- Created custom apps, objects, fields, validation rules, page layouts and FlexiPages, etc.
- Applied Agile Scrum methodologies extensively in project execution.
- Utilized Azure DevOps for efficient management of agile sprints, bug tracking, and testing life cycle and pipeline management.
- Demonstrated expertise in SDLC, specifically emphasizing agile development processes.

**Licensing & Case Management, MLITSD – (Jan. 2023 – Feb2023):** Project Description – Includes the development of a Licensing and Case Management System for the Government of Ontario – Ministry of Labour, Immigration, Training and Skills Development integrating with external client legacy systems.

**Project Role** – Solution Architect

**Key Tasks and Responsibilities -**

**Collaboration and delivery:**

- Engaged with Clients during discovery sessions to understand Business rules.
- Implemented The Public Sector Solution, OmniStudio and Customer community.
- Created the Technical Flow and shared the approach with the team.
- Developed solutions and proofs-of-concept to satisfy client requirements.

**Canada Digital Service – CDS Salesforce Implementation (December 2022 – Jan 2023):**

**Project Description** – Canada Digital Service was focusing on a digital solution to manage their Intakes and Engagements with various Government Departments.

**Project Role** – Solution Architect/Business Lead

**Key Tasks and Responsibilities:**

**Solutions and Delivery:**

- Engaged with Client Organizations to define and drive policies/guidelines related to Business Transformations, Business Architecture, and Data Architecture.
- Developed the overall plan and scheduling milestones.
- Partnered with Business Project Manager to lead business and development teams in defining the most suitable and efficient product/solution.
- Provided advice and recommendations leveraging the Salesforce platform, enabling the implementation of long-term strategies.
- Managed end-to-end delivery of Salesforce projects.
- Provided specialized systems knowledge to assist with problem-solving and application development.
- Translated business requirements into well-architected solutions that best leverage the Salesforce platforms and products.
- Provided guidance and consultation to the client during implementation.
- Managed a team of 5 members to design, build, deploy and test the solution.
- Performed code review to ensure platform best practice and performance of the application.

**Natural Resource Canada – 2 Billion Trees Project (June 2022 – November 2022):**

**Project Description** – 2 Billion Trees Project focuses on designing and implementing a digital solution to enable efficient program administration and meet the Government of Canada's commitment to plant 2 billion trees by 2031.

**Project Role** – Salesforce/OmniStudio Developer

**Key Tasks and Responsibilities:**

- Designed and developed OmniScripts to address various business requirements.
- Built Data Raptors, Flex Cards, Integration Procedures and Calculation Procedures for the solution.
- Created custom app, objects, fields, validation rules, page layouts, FlexiPages, dashboards and reports.

**Ministry of Long-Term Care – Long-Term Care Home Inspections System (Mar 2022 – June 2022):**

Project Description – Digital transformation of Ontario Long term care inspection applications

Project Role – Salesforce/OmniStudio Developer

Key Tasks and Responsibilities:

- Salesforce/OmniStudio Developer Ensuring quality and timely delivery:
- Managing a team of six members to design, build, deploy and test the solution.
- Developing the setup of dev-ops process and pipelines to manage source code and deployments.
- Responsible for timely completion and submission of all technical deliverables.
- Providing status updates of the technical deliverables to the key stakeholders.
- Work in collaboration with the testers for effective testing and quick resolution of bugs.
- Supporting the team with technical queries to effectively enable a successful team.

**City Of Elgin – Quick Permits (Oct 2021 – Feb 2022):**

Project Description – The City of Elgin required a SaaS solution to manage Quick Permits for its residents. This implementation highlighted a Proof of Concept (POC) Licenses and Permits solution for the city's Quick Permit requirements on the Salesforce Public Sector Foundation platform (PSF). In addition to a successful POC, the Quick Permits solution was configured, developed, and deployed in the City's existing Salesforce org.

Project Role – Project Lead, Salesforce/Vlocity Developer

Key Tasks and Responsibilities:

- Created a customer-facing portal on the community cloud for quick permits.
- Developed OmniScripts for various permits and license applications with data raptors, IP and LWC (Lightning Web Components) to allow applications for multiple permits.
- Developed a complex document generation using OmniScript to view documents/files from Salesforce.
- Developed custom solutions using Apex and triggers (trigger logic, test classes, trigger logic, test plan, test scripts, and test scenarios) and custom screens using lightning components to fully test the application.
- Gathered requirements; created, assigned, and maintained user stories in Jira.
- Deployed changes from Dev to Full Sandbox and later to Production.
- Created App, custom objects, fields, lightning record pages, page layouts, permission set groups, permission sets, flows, integration procedures, public groups, queues, and list views on Salesforce Lightning experience.
- Configured many operational reports & built dashboards to provide real-time insight into the overall status of the permits, payments & cases.

**Office Of the Superintendent Of Bankruptcy Canada – Debtor Compliance Management (May 2020 – September 2021):**

Project Description – One of ISED's sub-departments, the Office of the Superintendent of Bankruptcy (OSB), intends to transition from a legacy case management system related to bankruptcy investigations to Salesforce. The objective of this project was to implement Salesforce Service Cloud to help the client transition from its legacy application. This project includes integration with legacy systems.

### Project Role – Salesforce/Vlocity Developer

#### Key Tasks and Responsibilities:

- Used Process and Flow Builder to implement an efficient managerial case approval flow. Implemented Salesforce Service Cloud, allowing OSB to transition from legacy systems.
- Created Vlocity OmniScripts, Data Raptors, and FlexCards during implementation.
- Created Apex trigger logic and test classes, knowledge base, reports, dashboards, flows, custom objects, and fields.

### Region of Peel, Brampton, Canada, ON

Resident Portal and Housing enhancements – Service Cloud & Vlocity Implementation (Feb 2019 – April 2020):

Project Description – The Solution was implemented on Service Cloud using Vlocity and Community Cloud for the Region of Peel to allow citizens to apply for various services.

Project Role – Salesforce Developer

#### Key Tasks and Responsibilities:

#### Collaboration with client:

- Worked in an Agile development team building applications of the highest standards with a view.
- Created various custom objects, fields, tabs, workflows, and flows for the application.
- Developed intake-forms using Vlocity OmniScripts.
- Created email templates in text, HTML, and VisualForce necessary for the application.
- Analyzed and created custom profiles as required for business needs.
- Implemented object level, field level, and record level security.
- Defined various validation rules to validate the data in the application.
- Customized page layouts for Salesforce.com standard and custom objects.
- Created dashboards, and custom report types, and generated reports using the report types.

### Housing application Enhancements – Service Cloud Implementation (Feb 2017 – Jan 2019):

Project Description – The existing housing application was extended for the Region of Peel to provide the applicants a portal where they can apply for subsidized housing.

Project Role – Salesforce Developer

#### Key Tasks and Responsibilities:

#### Solutions and delivery:

- Conducted requirements-gathering sessions with users; facilitate the requirement validation sessions, and work-group meeting sessions, reach out to users through emails and scheduled meetings to gather requirements.
- Configured and customized the existing solution for new enhancements using Apex and triggers (trigger logic, test classes, trigger logic, test plan, test scripts, and test scenarios) and custom screens using lightning components to fully test the application.
- Organized and planned the requirements to prepare the business requirement Documentation and Functional Requirement Documentation.

- Designed and developed flow charts, activity diagrams, decision trees and decision tables to support business requirements.
- Worked closely with clients, business users, testing teams and technical teams to analyze the technical constraints, issues, and risks.
- Conducted research on the original scope of the project as per the original contract and changes to the scope of the project due to various technical constraints in the original scope.

Participated and provided input in the test advisory meetings on deciding the testing methods and test conditions.

## 4.5 Developer 1 - Rugshan Gnanandram



### Rugshan Gnanandram

#### Developer 1

#### Certifications

- Salesforce Certified Administrator
- Salesforce Certified Platform Developer I
- Salesforce Certified OmniStudio Developer

#### Technical and Functional Skills

##### Salesforce Core Skills:

- Salesforce Administrator, Process Builder, Flows, Validation Rules, Reports, Dashboards, Sales Cloud, Public Sector Solutions.

##### Custom Development:

- Apex Triggers, Apex Class, Integration, OmniStudio, VisualForce, Lightning Web Components, SOQL

##### Tools / Modules:

- Other Languages: Java, Python, C, HTML, CSS, JavaScript, SQL, MATLAB, VHDL
- Other Technologies: Git, GitHub, JUnit, TestNG, RabbitMQ, gRPC, Selenium, Linux, VS Code, IntelliJ Idea, PyCharm, REST API, Postman API, Workbench, Developer Console

#### Education

- Bachelor of Computer Engineering (BEng)

#### Languages

- English

#### Professional Background

Rugshan is Salesforce Associate with expertise in software development. He has a Bachelor of Engineering in Computer Engineering, concentrated in Software Engineering. Throughout his undergrad, he has led many software projects and worked on many others as a hobby. Rugshan is passionate about designing software programs and always striving to improve and expand on his technical and non-technical skills.

## Projects Experience

Senior Associate, Salesforce Developer (Oct 2022 - Present)

### Region of Halton-CCCP/CDS (Mar 2024 – Present)

Project Description – Region of Halton is doing a digital transformation of all existing services by rebuilding and migrating data and processes into a Salesforce solution.

Project Role – Senior Developer

Key Tasks and Responsibilities:

Solutions and Delivery:

- Leveraged OmniStudio to transform paper-based forms into a digital-first and dynamic solution using OmniScripts, Flexcards, and Data Raptors.
- Continuously iterated on database and data model designs to normalize legacy monolithic database models.
- Built efficient Flows to handle business process triggers and key scheduled events.

### OMAFRA-Nutrient Management Phase 2 (Déc. 2023 – Mar 2024)

Project Description – OMAFRA's Environmental Management Branch (EMB) is responsible for administering Nutrient Management Strategy (NMS) approvals and Non-Agricultural Source Materials (NASM) plans under the Nutrient Management Act (NMA). Phase 2 involves data migration and enhancements to the existing Salesforce solution.

Project Role – Senior Developer

Key Tasks and Responsibilities:

Client Engagement and Updates:

- Actively participated in daily scrum calls with clients, delivering comprehensive updates and addressing intricate technical queries.
- Requirements Solutioning and Documentation:
- Played a key role in the solutioning of requirements, contributing technical insights, and documented approaches under user stories.
- Internal Communication and Requirement Alignment:
- Maintained consistent and effective communication with the internal functional team to ensure a thorough understanding of all requirements, fostering accurate and precise implementations.
- Innovative Solutions and Proof-of-Concepts:
- Developed tailored solutions and proof-of-concepts to meet and exceed client requirements, demonstrating a commitment to delivering innovative and effective solutions.
- Employed PostMan and Apex Web Services to develop a RESTful API with pagination, streamlining data extraction processes and enhancing efficiency. Additionally, authored a Python script to serve as a template consumer for the API.
- Implemented a batch Apex script to optimize report generation, thereby reducing licensing expenses while ensuring accessible data attachments for non-licensed personnel.

Data Analysis and Migration:

- Demonstrated proficiency in data analysis, cleansing, transformation, documentation, and migration procedures, successfully transitioning legacy relational database systems to a modern platform.

**Release Management:**

- Spearheaded the smooth release of a new application into a shared environment, managing merges, pull requests, and devising effective release strategies.

**MLITSD Licensing & Case Management (Jan 2023 – Dec 2023)**

**Project Description** – Includes the development of a Licensing and Case Management System for the Government of Ontario – Ministry of Labour, Immigration, Training and Skills Development integrating with external client legacy systems.

**Project Role** – Software Developer

**Key Tasks and Responsibilities:**

**Client Interaction and Communication:**

- Engaged in daily scrum calls with clients, delivering comprehensive updates and addressing technical inquiries.
- Participated actively in requirement gathering calls and internal developer meetings, providing valuable technical insights and solutioning approaches.

**Documentation and Technical Artifacts:**

- Documented technical approaches and implementations meticulously in design and architectural documents.
- Produced comprehensive documentation, including entity-relation diagrams, sequence diagrams, use-case diagrams, flow diagrams, and threat-risk assessment documents.

**Collaboration and Quality Assurance:**

- Maintained seamless communication with the internal functional team to ensure a clear understanding and accurate implementation of all requirements.
- Conducted thorough code reviews, peer reviews, and provided constructive feedback to maintain code quality.

**Solution Development and Integration:**

- Developed customized solutions and proof-of-concepts to meet client requirements.
- Designed and implemented a seamless integration with an external legacy case management system, employing tools such as Postman REST API Client, Lightning Web Components (LWCs), Apex (Asynchronous, Synchronous, Batch, Scheduled), and database design.
- Created a mass-email solution within daily system email limits, leveraging Apex (Synchronous, Invocable Methods, Batch, Scheduled) and Flows (Screen).
- Successfully integrated a third-party payment processor through REST API, involving data model design, Apex classes, and Flows.

**System Components and Modules:**

- Contributed to the development of various components and modules, including custom Lightning Web Component (LWC) tables, OmniStudio OmniScripts, Flexcards, Integration Procedures, and DataRaptors.

- Worked on SAML Single Sign-On integrations, ensuring secure authentication processes.

UI Design and Conformance:

- Implemented UI designs to adhere to specific design system rules, guidelines, and accessibility standards.
- Utilized Lightning Web Components (LWCs), HTML, VisualForce, CSS, and OmniScripts for effective UI development.

Release Management:

- Orchestrated multiple major milestone releases to production, encompassing tasks such as reviewing Git branches, merging branches, resolving merge conflicts, preparing release documentation, updating Azure CICD pipelines, conducting mock deployments, and performing live deployments.

**InvestON - Salesforce Administrator Training (Jan 2023 – Feb 2023)**

Project Description – Responsible for providing Salesforce Admin training to new CSA members and Invest Ontario clients. Included designing and presenting hands-on sessions while being available for questions or concerns regarding the content.

Project Role – Coordinator & Trainer

Key Tasks and Responsibilities -

Curriculum Creation:

- Developed comprehensive lessons, examples, activities, and slide decks meticulously crafted for utilization during training sessions.

Live Presentations and Demonstrations:

- Conducted engaging live presentations and hands-on demonstrations, fostering an interactive learning environment to facilitate rapid comprehension.

Proficient Q&A Support:

- Demonstrated adept knowledge of the Salesforce Admin certification and ecosystem by confidently addressing questions, contributing to a rich learning experience for participants.

**Canadian Digital Service (CDS) - CRM Implementation (Dec 2022 – Jan 2023)**

Project Description – Salesforce Sales Cloud CRM implementation enabling the client to manage their end-to-end sales activities.

Project Role – Software Developer

Key Tasks and Responsibilities:

Client Collaboration:

- Actively participated in daily scrum calls with clients.
- Provided comprehensive updates and addressed relevant inquiries.
- Engaged clients in the agile solutioning process for the system.

Requirements Management:

- Spearheaded the gathering of requirements.

- Crafted detailed user stories to thoroughly encapsulate client needs.

Effective Communication:

- Maintained consistent communication between the internal functional team and the client team.
- Ensured a clear understanding and accurate implementation of requirements, facilitating swift progression and development of the application.

Technical Solutioning and Development:

- Contributed to the technical solutioning and application development.
- Ensured the fulfillment of client requirements to the highest standards.

Quality Assurance:

- Conducted rigorous QA testing during sprints and deployments to various environments, including production.
- Implemented rapid bug-fixes during User Acceptance Testing (UAT).

Documentation and Deliverables:

- Authored and contributed to various project documents and deliverables.
- Developed materials such as an Admin Guide, User Guide, and Technical Design Document.

Client Engagement Events:

- Delivered multiple end-of-sprint demos and Minimum Viable Product (MVP) demos.
- Hosted numerous training sessions to enhance client understanding and utilization of the application.

**Ryerson University**

**Undergraduate Student (Sept 2018 – Sept 2022)**

Autonomous Fetching Assistant with Voice Control for Assisted Living (Sept 2021 – May 2022)

Project Description – Capstone design of an autonomous fetching robot used for assisted living. Involved 4 months of designing and 4 months of prototyping. Python was the primary programming language used along with a RaspberryPi and various controllers and peripheral devices.

Project Role – Software Developer

Key Tasks and Responsibilities:

Capstone Award Recognition:

- Recognized as the winners of the prestigious 2022 Ryerson Engineering Day (RED) Capstone Award in Computer Engineering.

Voice Control Integration:

- Successfully implemented voice control utilizing the Porcupine wake-word detection platform and Google's Speech-to-Text API.

Autonomous Flow and Navigation:

- Achieved autonomous flow and navigation through a synergistic integration of voice control, object detection, and peripheral electronics.

- Implemented necessary safeguards to ensure the system's high reliability and usability.

Documentation and Reporting:

- Generated a series of comprehensive milestone reports and final design documents throughout the 8-month project timeline.

Collaborative Team Efforts:

- Engaged in extensive collaboration with team members.
- Effectively communicated requirements, progress, and issues within the team.
- Conducted thorough reviews, testing, and debugging of various aspects of both software and hardware design.

Version Control Implementation:

- Established a robust version control system for the project codebase.
- Provided training to team members on utilizing Git & GitHub for efficient code management.

**City Waste Collection (Jan 2022 – May 2022)**

Project Description – Distributed Systems & Cloud Computing project. Utilized Python to develop a client-server city waste collection system that included dispatching vehicles and notifying residents.

Project Role – Software Developer

Key Tasks and Responsibilities:

Scalable Multithreaded System Design:

- Engineered a scalable and multithreaded system for the efficient deployment of waste collection vehicles and seamless notification dissemination.

Network Representation with NetworkX:

- Utilized NetworkX to create a directed graph that effectively represented streets and intersections.
- Generated optimal paths for waste collection vehicles within the network.
- gRPC-Based Communication:
- Implemented communication channels between the dispatch server (HQ) and clients (vehicles) using gRPC.
- Ensured efficient and secure exchange of information for streamlined operations.

Publisher-Subscriber Notification System:

- Established a robust publisher-subscriber notification system with RabbitMQ.
- Enabled residential users to receive either city-wide collection notifications or localized alerts based on their preferences.

Logging for Statistical Analysis:

- Implemented the use of JSON dumps to create comprehensive logs for every waste collection.
- Facilitated accurate and detailed statistical analysis of collection activities for informed decision-making

## 4.6 Developer 2 – Leela Kamal



**Leela Kamal**

Developer 2

### Certifications

- Salesforce Certified OmniStudio Developer
- Salesforce Certified Developer I
- Salesforce Certified Administrator
- Salesforce Public Sector Solutions - Accredited Professional

### Technical and Functional Skills

#### Salesforce Core Skills:

- Sales Cloud, Service Cloud, Industry Cloud, Public Sector Solution, LPI, Community Cloud, Flows, Validation Rules, Reports and Dashboards, SSO, Relational and dimensional data models, and data integration.

#### Custom Development:

- Apex Triggers, Apex Class, Integration, Lightning Components

#### Tools / Modules:

- SQL, SOQL, Data Loader, Workbench, Visual Studio code, Git (Version Control), Bitbucket, Jira, Microsoft Azure, Ayehu, UiPath, ServiceNow Orchestration, PowerShell, Python, Linux Shell scripting.

### Education

- Master of Science in Information Technology

### Languages

- English, Tamil

### Professional Background

Leela is an experienced Salesforce and Vlocity platform developer more than five years of experience in Information technology. She has high proficiency in Salesforce and extensive experience in the areas of requirement gathering, solution designing, application implementation, production support, developing use case diagrams, flowcharts, documentation, unit testing, UAT (User Acceptance Testing), go-live and post go-live support, and conducting knowledge transitions for projects.

## Project Experience

Senior Associate, Salesforce Developer (Feb 2022 – Present)

### Natural Resources Information Portal (Nov 2023 – Present)

Project Role – Senior Developer

Key Tasks and Responsibilities:

#### Solutions and Delivery:

- Leveraged OmniStudio to transform paper-based forms into a digital-first and dynamic solution using OmniScripts, Flexcards, and Data Raptors.
- Continuously iterated on database and data model designs to normalize legacy monolithic database models.
- Built efficient Flows to handle business process triggers and key scheduled events.

### Licensing and Case Management, MLITSD (Feb 2023 – Oct 2023)

Project Description – Includes the development of a Licensing and Case Management System for the Government of Ontario – Ministry of Labour, Immigration, Training and Skills Development integrating with external client legacy systems.

Project Role – Senior Developer

Key Tasks and Responsibilities:

- Worked on setting up devops process and pipelines to manage source code and deployments.
- Developed proofs-of-concept to satisfy client requirements.
- Setting up the exception logger framework.
- Setting up data model and security model.

### Nutrient Management System, OMAFRA (July 2022 – Jan 2023)

Project Description – OMAFRA's Environmental Management Branch (EMB) is responsible for administering Nutrient Management Strategy (NMS) approvals and Non-Agricultural Source Materials (NASM) plans under the Nutrient Management Act (NMA)

Project Role – Senior Developer

Key Tasks and Responsibilities:

- Implemented Public Sector foundation platform and extended the same as per the business requirements.
- Implemented a guided flow using OmniScript to intake the json file to create a submission.
- Worked on setting up devops process and pipelines to manage source code and deployments.
- Setting up the exception logger framework.
- Performed code review to ensure platform best practises and performance.
- Provided support training to client technical team on the features.
- Implemented multi-lingual document generation with omnistudio.

- Executed data transfer from legacy system to salesforce using data loader.

### **Cognizant Technology Solutions**

#### **Lincoln Financial Group (Sep 2018 – Dec 2020)**

Project Description – Lincoln Financial Group is an insurance company in America. The scope of the project was to automate the incidents, problems, and alerts generated by monitoring systems and business applications. As a team we developed workflows using Ayehu and UiPath to automate the repetitive and time-consuming work for all the towers (Windows, Linux, Network, Database). Generated reports and scheduled using the automation tool. Provision web applications to live production servers.

Project Role – Senior Infra Developer

Key Tasks and Responsibilities:

- Involved in identifying opportunities to automate manual tasks using ITPA and RPA (Robotic Process Automation) technology.
- Collaborated with client's infrastructure, network & security team to setup and configure the automation ecosystem in the client environment.
- Contributed towards HLD and LLD phase and design documents preparation by integrating different modules.
- Created workflows and reusable automation framework.
- Created and implemented PowerShell scripts in automation workflows.
- Implemented Ayehu user authentication by defining user roles, creating users, and setting password policies.
- Integrated automation tool with ITSM tool through API (Application Programming Interface), also with other external components such as active directory, email component, VMware, SharePoint, and other networking components such as Infoblox.
- Implemented failover cluster to maintain the high availability of automation servers and workflows.
- Prepared demos based on the automation performed and highlighted the same to potential internal and external customers.
- Involved in complete software development life cycle process from gathering requirements and developing the code in the development environment deployed the code to QA and production.
- Migrated 20+ Ayehu eye share workflows to Ayehu Ng as part of the tool upgrade.
- Configured approval processes, assignment rules, and escalation rules based on business requirements.
- Deployed the automation workflows into test and production environments and efficiently handled monitoring and troubleshooting.
- Operated within established change management procedures and adhered to, helped in developing needed standards, procedures, and practices.
- Provided direction, shared knowledge and mentored team members in areas of expertise.

#### **Voya Financial (Jan 2017 – Aug 2018)**

**Project Description – Voya Financial** is an American based insurance and financial company. The scope of the project was to automate daily system maintenance, backups, and system health checks. To achieve the client's requirement, we developed scripts to monitor results of nightly batch process and took necessary actions.

**Project Role – Infra Developer**

**Key Tasks and Responsibilities:**

- Assessed automation opportunity from technical perspective and performed due diligence to arrive at an optimal solution and identified the technical impacts of applications.
- Created technical architecture for the integration of automation tools with ITSM tool or ticketing tool.
- Conducted feasibility check for the given business model by the client and designed RPA tasks as per application and business requirements.
- Worked with functional leads to transform and develop new requirements into design and implementation.
- Created rules to trigger the workflow based on the details from the auto-generated ticket.
- Designed automation processes as per the operational needs of an organization.
- Supported production cases, functional troubleshooting, feature explanation, resolution on critical technical, and business issues.
- Supported in end-to-end deliveries to production – including analysis, planning, model, design, develop, code, test, debug, and documentation.
- Created database connections to fetch the data and automated the process to arrange data using automation tool.
- Automated common maintenance tasks to reduce time consuming, error prone manual process which included rebooting systems, restarting services, and adding system resources.
- Performed code reviews using internal code review tools assess, troubleshoot, and document the maintenance procedure.
- Created and documented the test procedures and scenarios for pre-UAT phases supporting the operational teams during UAT and rollout phases.
- Ensured the designed process is providing the required results after an automation task is rolled for production.
- Designed and coded application components in an Agile environment utilizing a test-driven development approach.
- Resolved critical production issues by carrying out root cause analysis.
- Prepared application operation documents and KEDB (Known Error Database) documents for recurring issue resolutions.
- Developed automated workflows to automate 60+ Application health checks resulting in 350 hours of effort saving per month.
- Implemented new functionalities and fixes to production on a weekly basis.

### **Victory Capital Management (Jun 2015 – Dec 2016)**

**Project Description – Victory Capital Management** is an investment management firm. The project scope was to customize automation for troubleshooting network and system failures across

distributed environments and reduce the response time to critical IT failures during weekends and off-duty hours, while managing password resets, and other repetitive and time-consuming task.

#### Project Role – Senior Developer

##### Key Tasks and Responsibilities:

- Performed ticket analysis and build reports to calculate the number of themes to automate in each tower, FTE savings, and total time that can be saved from automation.
- Ensured client requirements get translated into functional specifications and eventually into a detailed level design.
- Integrated automation tool with ITSM tool or ticketing tool directly or through application programming interface.
- Worked with subject matter experts on functional and technical design documents.
- Created workflows in the tool for the given process using already existing palettes, power shell, and shell scripting.
- Coordinated with different tower leads like Windows, Linux, Network, and Database to resolve issues.
- Automated maintenance task such as running health checks on Linux, Windows, and Unix servers, checking application availability.
- Performed unit testing, integration testing, end-to-end testing in DEV environments before releasing them to PROD environments.
- Supported existing processes and implemented change requirements as part of a structured change control process.
- Worked on integrating applications like Web services, Mainframe, MS office, GUI, and Outlook while using workflow and automation tools.

## 4.7 Developer 3 - Dheeraj Kumar



**Dheeraj Kumar**  
Developer 3

### Certifications

- Certified Platform Developer I
- OmniStudio Certified Developer
- Salesforce Certified Administrator
- Salesforce Certified Experience Cloud Consultant
- Salesforce Certified Platform App Builder

### Technical and Functional Skills

#### Salesforce Core Skills:

- Sales Cloud, Service Cloud, Force.com, Public Sector Solution, LPI , Grants, Community Cloud, Einstein Analytics, Sites, Flows, Workflow Rules, Process Builder, Validation Rules, Security Controls, Reports and Dashboards, Chatter.

#### Custom Development:

- Apex Triggers, Apex Class, Visualforce Page, API, Aura, Lightning Components

#### Tools / Modules:

- Data Loader, Workbench, SQL, SOQL, Salesforce VS Code, Dev Console, Github, GitLab, Vlocity build tool

### Education

- Post Graduate diploma in Quality Engineering Management

### Languages

- English, Hindi, Punjabi

### Professional Background

Dheeraj is a skilled Salesforce Developer with extensive experience across multiple Salesforce.com projects, including roles as both a Salesforce Developer and OmniStudio Developer. He brings a comprehensive background in planning, analysis, design, building, testing, deployment, and training, showcasing his versatility across all phases of the development lifecycle. With strong expertise in Salesforce Platform development, Dheeraj is proficient in administration, configuration, implementation, and support of Salesforce CRM, utilizing the Apex programming language and the

Force.com platform. He holds several Salesforce and Vlocity certifications, demonstrating his commitment to maintaining high standards of proficiency and knowledge in Salesforce technologies.

**Equality Street – MECP Forms Digitalization (June 2023 – July 2024)**

**Project Role** – Salesforce/Omnistudio Developer

**Key Tasks and Responsibilities:**

- Made recommendations to improve the effectiveness of the team, including the assignment of development tasks to enhance overall productivity.
- Engineered an Endangered Species Portal that streamlined the process for project proponents and consultants to submit pertinent information regarding their activities, ensuring compliance with the Endangered Species Act.
- Leveraged Salesforce multi-language Omniscript to provide users with the ability to seamlessly translate the portal's content from English to French
- Ensured the user interface adhered to the Ontario Design System standards, promoting a consistent and visually appealing design.

**Clariti Package Upgrade for Regional Municipality of Peel (April 2023 – June 2023)**

**Project Role** - Salesforce/Omnistudio Developer

**Key Tasks and Responsibilities:**

- Experience in utilizing Azure DevOps for agile sprint management, bug tracking, and testing life cycle management.
- Worked on data loaders, SOQL, SOSL
- Provided support for bug fixes.
- Upgraded packages for various releases.

**Ministry of Long-Term Care (March 2022 – April 2023)**

**Project Role** - Salesforce/Omnistudio Developer

**Key Tasks and Responsibilities:**

- Developed Flex Card for showing contextual information and actions for customer account data and supply quick access to relevant tasks.
- Created DataRaptors for getting salesforce data.
- Worked on Calculation matrices and calculation Procedures to handle variable input values and calculations.
- Building Complex and Reusable OmniScripts.
- Worked on Salesforce Lightning Flow and Process builder.
- Worked on Apex Managed Sharing
- Developed LWC to meet the business requirement.
- Client-side Document Generation for various business Process
- Worked on GitLab source code management tool.
- Effective Utilization of VS code for Salesforce components deployment and Vlocity build tool for Omnistudio components.
- Worked on documenting processes and technical designs.
- Experienced in conducting root cause analysis to troubleshoot and resolve defects.
- Worked on data loaders, SOQL, SOSL
- Delivered the User story timely based on sprint planning.
- Experience in utilizing Azure DevOps for agile sprint management, bug tracking, and testing life cycle management.

- Implemented AODA compliant solutions.

**City Of Elgin Quick Permits (Oct 2021 – March 2022)**

**Project Role - Salesforce/Omnistudio Developer**

**Key Tasks and Responsibilities:**

- Installed PSF manage package.
- Deployed changes from Dev to Full sandbox
- Created OmniScript, DataRaptors and Integration procedure.
- Created Salesforce Lightning Flow and Process builder.
- Built Community for portal and enable login user Functionality.
- Managed Dev team
- Experienced in design, code, test, debug, and document applications.

**Grants Management System, Developer (June 2021 – August 2021)**

**Project Role - Salesforce/Omnistudio Developer**

**Key Tasks and Responsibilities:**

- Creating vlocity OmniScripts for various business process.
- Developed Flex Card for showing contextual information and actions for customer account data and supply quick access to relevant tasks.
- Created DataRaptors for getting salesforce data.
- Enhanced a developed prototype solution for Grants Management.
- Worked on Salesforce Lightning Flow and Process builder.

**Intelogik Solutions Client: BCBS, USA (July 2016 - June 2018)**

**Project Role - Salesforce Developer**

**Key Tasks and Responsibilities:**

- Implemented CTI (Ingenious) and WFM (Monet) App Exchange products on Service Cloud.
- Facilitated in gathering and analysis of business requirements and then took part in sprint planning to achieve the requirement.
- Analyzed the business process of client and then started in creating the application and data model required for the requirement.
- Prepared custom application, objects, tabs, fields with the custom functionality to meet the business requirement.
- Defined lookup and master-detail relationships on the objects and created junction objects to establish connectivity among objects.
- Effective utilization of Salesforce Lightning Aura Component and LWC in the projects.
- Prepared reports, dashboards, and processes to continuously monitor data quality and integrity and Co-ordinate users with report design and management.
- Streamlined Assigning Roles Hierarchy, Profiles and Security setup within the organization.
- Implemented Salesforce automation using web-to-case forms, email-to-case, assignment, automation and queues, auto response, escalation rules, chatter groups, Person accounts, cases and solutions.

**Salesforce developer, intelogik solutions – client-American Red Cross. (April 2014 -June 2016)**

**Project Role - Salesforce admin**

**Key Tasks and Responsibilities:**

- Spearheaded as Salesforce admin support governing user account creation, personal information setup, password reset, Roles & Profile creation, user group creation, updating company profile, Network access setup.
- Assigned in setting up field level access for each custom object based on the user's role within the organization.
- Managed the Data Transformation and Data Cleaning activities while transferring the data to the external system using Informatics on Demand.
- Established lookup and master-detail relationships on the objects and junction objects to form connectivity among objects.
- Executed field & page layout customization for the standard objects like Account, Contact, and Leads.
- Designed workflow rules and defined related tasks, time triggered tasks, email alerts, filed updates to implement business logic.
- Salesforce administrator, apex developer and defender of data integrity for 100 users.
- Integrated Email with Salesforce.com for mass E-mail management and designed custom E-mail templates.
- Maintained user roles, security, profiles, and workflow rules wherever necessary.

## 4.8 Developer 4 – Doan Nguyen



**Doan Nguyen**  
Developer 4

### Certifications

- Salesforce Certified Administrator
- OmniStudio Certified Developer

### Salesforce Skills

- Apex, Flow Builder, Process Builder, SOQL, Lightning Web Component, Reports and Dashboards, OmniScript

### Tools / Modules:

- HTML, JavaScript, VueJS, CSS, jQuery, ExpressJS, Java, Python, C, C++, Swift
- VS Code, Git, Aduino, XCode, Firebase Database

### Education

- 2018 - 2022: Toronto Metropolitan University (Ryerson), Toronto, ON - Bachelor of Engineering in Computer Engineering

### Professional Background

Doan Nguyen is a Developer with expertise in software and hardware development. She has a Bachelor of Engineering degree with experience in app and web development, logic gates, and hardware implementation. Doan is a young, ambitious and motivated individual who delivers excellent results to achieve customer satisfaction.

### Key Tasks and Responsibilities:

As a Salesforce Developer at Cloud SynApps, my responsibilities include the following:

- Collaborated with other team members to produce the most optimal solution for the clients.
- Provided clients with most up-to-date Salesforce solution to ensure best practices in all Salesforce platforms.
- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.
- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)
- Conversed with clients to make sure all their needs and requirements are met.
- Troubleshooted existing systems and identified areas for improvement.

### **Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) (July 2022 – December 2022)**

**Project Description** - Salesforce platform provides OMAFRA with a swift transition from their legacy system, allowing for automation of their application and approval process. With new functionalities from the Salesforce solution, for instance, email confirmation, automated flows, file extraction and report capabilities to help efficiently manage their application streamline.

**Project Role** - Salesforce Developer

#### **Key Tasks and Responsibilities:**

- Implemented an outlook integration for the application so that the user can compose and send emails to outlook contacts.
- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)
- Utilized Service Cloud to develop a case management solution
- Designed flows and guided user interaction with optimal user experience to help the user navigate through the application with ease.
- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.
- Demonstrated leadership in the creation of the checklist procedure to improve the user experience and aid in the automation of the application process.

### **RoP PSF Upgrade (January 2023 – July 2023)**

**Project Description** - Advanced system version to RoP existing platform to upgrade Salesforce version, implement additional forms and data storage. The upgrade provides new forms and functionalities while still maintaining the consistency with older versions and ensure that the system supports both versions.

**Project Role** - Salesforce Developer

#### **Key Tasks and Responsibilities:**

Analyzed the issues in the previous platform version to ensure all bugs are tackled at root level and are accounted for.

- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)
- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.
- Utilized Experience Cloud to develop custom online portals

Consulted with clients about new design changes to ensure the client see through the development process and be on the same page as the development team.

Maintain AODA compliances and make sure all forms are consistent throughout the system.

- Implemented Lightning Web Components to extend the capabilities of Salesforce beyond its out-of-the-box features, tailoring the platform to perfectly align with the client's requirements.

### **Covid forms and Community Development (August 2023 – September 2023)**

**Project Description** - A cutting-edge platform dedicated to providing a secure and efficient solution for healthcare professionals in the Region of Peel to order and track their COVID vaccine supplies. The project aimed at streamlining the ordering process and enhancing the overall management of vaccine distribution.

**Project Role** - Salesforce Developer

**Key Tasks and Responsibilities:**

Designed and deployed a secured online community exclusively tailored for healthcare professionals, ensuring a safe and confidential environment for vaccine ordering transactions.

- Developed Lightning Web Components, Process Builder and Visual flows.
- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)

Implemented robust security measures to safeguard sensitive healthcare information, ensuring compliance with regulatory standards and maintaining the confidentiality of vaccine-related data.

- Utilized Experience Cloud to create a portal tailored for external users providing seamless access to the COVID-19 vaccine ordering processes.
- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.

**ROP – Digital Forms & PSF Upgrade (September 2023 – October 2023)**

**Project Description** – A Transformation of Region of Peel's prenatal registration process by spearheading the digitalization of their online registration form. The initiative aimed to provide expectant mothers with a seamless and user-friendly platform, simplifying the registration process for prenatal programs and enhancing accessibility for a diverse demographic.

**Project Role** - Salesforce Developer

**Key Tasks and Responsibilities:**

Revamped the registration form to facilitate a smooth and efficient process, minimizing the effort required from expectant mothers to enroll in prenatal programs. This contributed to increased participation and engagement.

- Utilized Experience Cloud to develop custom online portals
- Developed **Lightning Web Components, Process Builder and Visual flows.**
- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)

Designed and implemented an intuitive online interface, ensuring a user-friendly experience for expectant mothers during the registration process.

- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.

**Equality Street – MECP Forms Digitalization – Phase 2 (November 2023 – Present)**

**Project Description** - Facilitates seamless communication between project proponents, consultants, and regulatory bodies. The portal served as a comprehensive platform for users to submit information

crucial for assessing potential impacts on species and habitats protected under the Endangered Species Act.

**Project Role - Salesforce Developer**

**Key Tasks and Responsibilities:**

Engineered an Endangered Species Portal that streamlined the process for project proponents and consultants to submit pertinent information regarding their activities, ensuring compliance with the Endangered Species Act.

- Developed Lightning Web Components, Process Builder and Visual flows.
- Developed Omniscripts to provide users with the ability to seamlessly translate the portal's content from English to French (multilingual implementation)
- Ensured the user interface adhered to the Ontario Design System standards, promoting a consistent and visually appealing design.
- Used Git to manage the codebase and collaborate effectively within the development team.

## **NGEN Communications**

**Software Developer | Jun 2020 – May 2022**

**Project Description** – Cloud platform that enables a digital housing market, including the buying and selling process.

**Key Tasks and Responsibilities:**

- Developed a multi-application platform using VueJs that provides the users with practical and innovative solutions for virtual real estate sales and marketing.
- Diagnosed errors efficiently through Q/A testing to improve the quality of the software and to keep the team on track with the project deadlines.
- Consolidated the platform's workflow using UX/UI knowledge to ensure an efficient and easy experience for the users.
- Demonstrated proficient teamwork and communication skills while collaborating with other developers to guarantee that client expectations and requirements are met.
- Employed agile methodologies, leveraging Jira to manage and track all tickets, ensuring seamless coordination and optimal project flow.

## 4.9 Release Manager - Akрати Saxena



### Akрати Saxena

### Release Manager

#### Certifications

- Salesforce Certified OmniStudio Developer
- Salesforce Certified Platform Developer I
- Salesforce Certified Administrator
- Salesforce Certified Data Architect
- Salesforce App Builder
- Salesforce Accredited Professional - Public Sector Solutions

#### Technical and Functional Skills

##### Salesforce Core Skills:

- Sales Cloud, Service Cloud, Experience Cloud, Partner Community, CRM Analytics, Industry Cloud.

##### Custom Development:

- Apex, Lightning web components, OmniStudio, Core Java and SAP ABAP HTML, XML, CSS, JAVA Script, JSON, Visual force, Document Generation using OmniStudio

##### Tools / Modules:

- Data Loader, Workbench, SQL, SOQL, Visual Studio Code.

##### Architectural Skills:

- Able to design future state technical diagrams and data models, Knowledge of salesforce best practices and governance rules.

##### Education

- Bachelor of Engineering in Electronics & Communication

##### Professional Background

Akрати is a certified Salesforce and Vlocity platform developer with 15 years of experience in IT including Salesforce and SAP. She is an expert in requirement gathering, design and build enablement, application implementation, application maintenance and production support, project management, release management, unit testing, UAT, go-live, post-go-live support, and conducting knowledge transitions for projects.

**Natural Resources Information Portal (Nov 2023 – Present)**

**Project Description** - This engagement is to digitize multiple business lines of the ministry. Main focus is to optimize the current implementation, update the front-end components to meet the design standards and implement the new set of digitization requirements.

**Project Role** – Senior Developer

**Key Tasks and Responsibilities:**

**Participation in Discovery Sessions:**

- Participated in the discovery sessions to thoroughly understand the given state of the client's SF ecosystem.
- Engaged in grooming sessions with BA's and Architects and Client team and provide inputs wherever required.

**Solutions and Delivery:**

- Leveraged OmniStudio to transform paper-based forms into a digital-first and dynamic solution using OmniScripts, Flexcards, and Data Raptors.
- Continuously iterated on database and data model designs to normalize legacy monolithic database models.
- Built efficient Flows to handle business process triggers and key scheduled events.

**Region of Peel – Clariti Upgrade (May 2023 – Sept 2023):**

**Project Description** – This is a short project for upgrading the Clariti (BasicGov) packages in the Region of Peel Salesforce environment.

**Project Role** – Technical Lead

**Key Tasks and Responsibilities:**

**Collaboration and delivery:**

- Provide SME support to the team and help them with the queries.
- Facilitate weekly status calls with the business stakeholders.
- Responsible for timely and successful delivery of the project.

**Cloud SynApps – CSA Labs (April 2023 – till date):**

**Project Description** – Develop the asset for Homelessness and Housing Solutions asset for Cloud SynApps using Salesforce and Omnistudio.

**Project Role** – Technical Lead

**Key Tasks and Responsibilities:**

**Solutions and Delivery:**

- Co-ordinate with the business analysts and prepare the designs for the asset.
- Create a self-serve client portal for citizens to submit and manage their housing needs (like homelessness/shelter, short term/long term housing needs, add/remove household members, transfer housing requests etc) with any state/city authorities.

- Designing and creating medium to highly complex Omniscritps for implementing the functional requirements.
- Leveraging Omnistudio document generation capability to generate forms and letters.
- Create a partner portal to enable housing providers to manage their accounts. This is a self-serve portal for the partners where there can submit an expression of interest, manage their inventory stock etc.
- Assist the team by providing technical SME support for Omnistudio.

**Region of Peel – Housing Intake Improvement Implementation (Dec 2022 – Mar 2023):**

**Project Description** – This was a short but complex project to enable self-serve functionality for submission of client intakes for the Housing enablement technology business department of the Region of Peel. This solution was to improve the TATs and accelerate the processing of client service requests related to housing services. The solution comprised of creating highly complex Omniscritps for building Resident Intake forms, document generation using Omnistudio document generation and customer portal.

**Project Role** – Technical Lead

**Key Tasks and Responsibilities:**

**Discovery and grooming:**

- Facilitate the discovery sessions with the key business users to collate the requirements.
- Translating these requirements into well-designed solutions adhering to Salesforce and Salesforce Omnistudio best practices.
- Creating user stories based on the requirements and documenting them using Jira.

**Collaboration with Client team:**

- Facilitating daily scrum calls with the technical team and bi-weekly status check points with the business.

**Ensuring Quality Delivery:**

- Ensuring successful implementation of the designs by constantly monitoring the development work and providing clarifications to the technical team wherever required.
- Assist the testing team by addressing their questions on needs basis.
- Responsible for timely and successful delivery of the project.

**Arizona State Board for Charter Schools – (Aug 2022 – Dec 2022):**

**Project Description** – Migrate from Charter School Management legacy system to Salesforce Communities. Used Experience Sites for public users, charter representatives, TRP, and auditors. Streamlined the review process for new applications and amendments for existing charters and schools. Added functionality for complaint creation by public users.

**Project Role** – Salesforce Technical Lead

**Key Tasks and Responsibilities:**

**Discovery and grooming of user stories:**

- Participate in discovery sessions along with the solution architects and business analysts and key business users for requirement gathering.

- Translating business requirements into well-designed solutions adhering to Salesforce best practices.

**Ensuring quality and timely delivery:**

- Managing a team of six members to design, build, deploy and test the solution.
- Developing the setup of dev-ops process and pipelines to manage source code and deployments.
- Responsible for timely completion and submission of all technical deliverables.
- Providing status updates of the technical deliverables to the key stakeholders.
- Work in collaboration with the testers for effective testing and quick resolution of bugs.
- Supporting the team with technical queries to effectively enable a successful team.

**Invest Ontario (IVO) – Client and Vendor Management Solution Implementation (April 2022 – Aug 2022):**

**Project Description** – Invest Ontario is a new agency carved out of the Ontario Ministry of Economic Development, job creation and trade to promote Ontario as a top-tier destination for investment and strategic business growth. IVO requested implementation of a CRM tool to manage their FDI (Foreign Direct Investment) deals. Additionally, the project required the implementation of a Partner Portal to enable collaboration between IVO and their partners.

**Project Role** – Salesforce Technical Lead

**Key Tasks and Responsibilities:**

**Discovery and grooming of user stories:**

- Translating business requirements into well-designed solutions adhering to Salesforce best practices.
- Managing a team of four members to design, build, deploy and test the solution.
- Developing the setup of dev-ops process and pipelines to manage source code and deployments.

**Solutions and delivery:**

- Implementing a custom solution for sharing opportunities/deals with the partners based on different access levels.
- Designing a partner portal for Invest Ontario partners to be able to access the deals being shared by them.
- Enabled Microsoft 365 and Salesforce integration using Einstein activity capture.
- Working on necessary reports and dashboards using CRM analytics (Tableau).
- Supporting the team with technical queries to effectively enable a successful team.

**Region of Peel – Housing Enablement Technology Support (Dec 2021 – Till Date):** **Project Description** – This project focuses on the ongoing stabilization support of Region of Peel’s housing solution after the Dec 2021 implementation. Support includes break fixes, minor enhancements, and providing support on technical functionalities.

**Project Role** – Success Manager

**Key Tasks and Responsibilities:**

**Collaboration and team management:**

- Collaborate with the client as part of daily stand-ups to share the status of the issues assigned to the team and discuss new requirements.
- Manage a team of three members ensuring high-quality and timely delivery with zero escalations using Agile methodology.

**Ensure quality delivery:**

- Provide support as a subject matter expert for all the technical solutions as part of the project implementation.
- Collaborated with the team in identifying resolutions and ensuring proper impact analysis is performed before solution implementation.
- Highlight any initial risks related to delivery and resource capacity to the respective stakeholders.

**Region of Peel – Peel Emergency Operational Support (Jan 2022 – Mar 2022): Project Description –** The Region of Peel required short-term support to manage their day-to-day operational issues, any break fixes, and minor enhancements.

**Project Role –** Salesforce/Vlocity Technical Lead

**Key Tasks and Responsibilities:**

**Collaboration with client:**

- Provided technical support for operational issues.
- Managed a team of two members ensuring high-quality delivery with zero escalations.
- Communicate risks and tasks effectively daily to the client technical lead. Implemented integration between ArcGIS and Salesforce maps. Updated dormant/un-used objects and settings.

**Solutions and delivery:**

- Implemented tenant rent deposit refund cancellation process.
- Designed automated process of providing data delta from Salesforce ArcGIS team using standard Salesforce Reporting tools.

**Region of Peel – Housing Enablement Technology Project (Oct 2020 – Dec 2021): Project Description –** The Region of Peel has implemented a customized housing technology platform that bridges the gap between housing provider and client with housing needs. This project enabled the region to effectively manage housing supply, clients need, eligibility, complex rent calculation, matching calculations, and subsidy payment processing.

**Project Role –** Salesforce & Vlocity Developer

**Key Tasks and Responsibilities:**

**Solutions and delivery:**

- Implemented a critical and complex function of the project: the solution for tenant rent calculation.
- Developed Vlocity OmniScripts for implementing rent solutions, provider onboarding, intake, waitlist framework, and contract generation.
- Implemented scripts to automate form and letter generation using Vlocity CLM.

- Developed apex remote action classes to integrate with Vlocity OmniScripts using Vlocity open interface.
- Created summarized and impactful reports using Salesforce Reporting and Snapshots.
- Implemented customized triggers using Triggering Framework, Flows and Process Builders to exceed client expectations.
- Created multiple custom objects, validation rules, queues, list views etc., and implemented data sharing, profiles, permission sets, permission groups etc.
- Designed Lightning Web Components, Aura Components to implement custom community login, registration, and password reset functionality.
- Implemented partner communities for providers to enable effective cross-organizational collaboration.

**Region of Peel – Peel Living Phase II – Rent Functionality (Jun 2020 – Sep 2020):**

**Project Description** – Implement the single source of truth of the whole rent functionality.

**Project Role** – Salesforce & Vlocity Developer

**Key Tasks and Responsibilities:**

**Solutions and delivery:**

- Implemented Peel living rent functionality using apex remote action classes, custom objects, and Vlocity OmniScripts and Actions.
- Implemented Apex batch classes to update data related to rent of respective units.
- Customized triggers on rent functionality custom objects using Triggering Framework.

**Cloud SynApps (Independent Contractor from India) – CSA Labs (Oct 2019 – May 2020)**

**Project Description** - CSA Labs is a program to build innovative solutions as per market demand and a re-usable component library of the functionalities which are commonly used in multiple projects.

**Project Role** – Salesforce & Vlocity Developer

**Key Tasks and Responsibilities:**

**Solutions and delivery:**

- Built custom objects according to the data model comprising of master-detail and look-up relationships, junction objects, formula fields, and validation rules.
- Developed various Lightning Components, used Lightning Data services and Apex controllers and ensured seamless communication between different Lightning Components using component and application events.
- Implemented custom sharing rules using Apex classes and triggers for enabling case assignment rules when case is created using lightning flows.
- Developed Lightning Screen Flow to enable look-up on custom objects where user can view selected records based on preferred user criteria.
- Developed Lightning Screen Flow for enabling user to submit a case from Community using case record types and consideration of assignment rules.
- Enabled linking of contact record with case records based on email provided during case creation in Lightning application using Process Builder and Auto-Launch flows.
- Developed multiple customer Lightning Communities using standard templates and various types of standard components like tabs, flows, tile menus on the communities, and custom lightning components to add required business functionalities on the community pages.

- Worked on Salesforce knowledge, created knowledge articles, enabled & published them on the customer community.
- Developed CSA Back2Work Solutions – Event registration.

**Accenture Solutions Pvt Ltd.**

**DuPont – T03 Maintain and MBI projects (Dec 2013 – Nov 2016):**

**Project Description –** Implementation of SAP-GTS module for DuPont and Application maintenance for existing SAP Solutions.

**Project Role –** SAP Team lead

**Key Tasks and Responsibilities:**

- Worked on Integration of SAP and SFDC for creation of price approval process on Salesforce.com, which replaced the existing price authorization system in SAP and other legacy price approval applications.
- Lead the offshore ABAP work for all work-streams by connecting with business and functional teams to prioritize and assign respective work.
- Worked with the network/basis team in building new middleware servers.
- Performed requirement gathering to understand the various business objectives and translate such to actionable requirements for the SAP system. Implemented SAP GTS compliance and customs management system for US, EMEA and Asia regions.
- Configured SPL, Embargo, product classification and foreign trade import/export scenarios in GTS.
- Designed and built ABAP objects to integrate SAP R/3 with SAP GTS systems.
- Provided technical solutions to GTS specific issues such as performing prototyping of various technical objects like BADI, customer exits, interfaces, reports, utilities and custom tables.
- Trained the new team members and assisted them in the development work.
- Performed development and design reviews.

**Dow Chemicals – Application Support (Jun 2013 – Nov 2013):**

**Project Description –** System Maintenance and Minor Enhancement project for existing SAP solution of the client.

**Project Role –** SAP Senior Developer

**Key Tasks and Responsibilities:**

- Worked on TAX/legal changes for the client in different countries (eg.CIN for India and other European countries).
- Worked on core ABAP development, building custom reports, enhancements, user exits, and function modules. /
- Created Nota Fiscal implementation for Brazil region of the client by developing SD routines and custom technical objects.
- Designed and delivered technical and functional solutions and documentation thereof.
- Developed new WM, SD, MFG and FI related ABAP objects such as classical and interactive reports, ALV reports, interfaces, Idocs, SAP scripts, BADI, enhancement framework, BAPI, BDC, message bus, and ABAP query.

- Performed batch job analysis, implement SAP OSS notes, and collaborated with the basis team to fix any network-based issues, and the security team to implement authorization specific scenarios.

**DuPont – T03 Maintain (July 2007 – May 2013):**

**Project Description** – Application Support and minor enhancement project for the existing SAP solution.

**Project Role** – SAP Developer

**Key Tasks and Responsibilities:**

- Worked on India sales tax implementation for the client.
- Implemented automation of manual time-consuming tax related processes for SAP in various countries (eg. India, Brazil and Argentina).
- Developed POC for implementing SAP - SolMan for existing client.
- Created custom routines to customize SD pricing and invoicing in SAP.
- Worked on ticket resolution for bug fixes and small enhancement projects.
- Worked on core ABAP RICEFW objects, Adis, BAPIs, and user exit enhancements.
- Delivered small change of scopes required for implementing low complexity modifications/enhancements creating reports, exits, SAP Scripts and SmartForms.
- Managing movement of transports to new systems for all modules in collaboration with the functional and basis team.
- Manage ORTs during system upgrade and maintenance cycles.

#### 4.10 QA - Rashmitha Shetty



**Rashmitha Shetty**  
Quality Assurance

##### Certifications

- Salesforce Administrator
- Salesforce Omni-Studio Consultant
- Copado certified Administrator
- Copado certified Developer

##### Salesforce Core Skills

- Salesforce consultant
- Sales & Service Cloud
- Community & Finance Cloud
- Lightning UI
- SQL, SOQL, SOSL

##### Tools / Modules:

- Copado, Salesforce toolkit, Selenium, JIRA, Azure Devops, Miro, HP ALM, Confluence, Git Suite, ServiceNow

##### Education

- B.Tech. (Computer Science & Engineering)

##### Languages

- English, Hindi, Kannada

##### Professional Background

Salesforce QA Specialist with expertise in Business Process and Software Engineering Methodologies. Demonstrates a strong foundation in testing, analyzing, and optimizing quality assurance processes within the Salesforce ecosystem. A highly motivated individual ready to tackle challenges, pursue growth opportunities, and excel in the dynamic and evolving Salesforce industry environment.

##### Project Experience

**Cloud SynApps – (Jan 2023 – Current)**

**MNRF- Natural Resources Information Portal (NRIP) | (Nov 2023 – Current)**

Type of Project: Licensing application

Role -Salesforce Business Analyst

**Key Tasks and Responsibilities:**

- Conducted brainstorming workshops involving internal teams and external stakeholders to foster collaboration and ideate strategies for developing and implementing solutions that align with business objectives
- Created Project backlog, Sprint backlog and user stories with acceptance criteria in Jira tool and closely monitored status, team progress and any impediments for immediate resolution.
- Collaborated with business stakeholders and IT technical solution teams to map technical requirements to business specifications.
- Analyzing Business Requirements and Solution Specification documents to design Test Plans, Test Strategies.
- Collaborated with the product manager to develop roadmaps by prioritizing epics and resolving roadblocks identified by the team
- Conduct sprint demos to clients, user story sign offs and taking feedback on work done.

**MLITSD - Temporary Help Agency and Recruiter Licensing | (Jan 2023 – Current)**

Type of Project: Licensing application

Role: Salesforce Business Analyst

**Key Tasks and Responsibilities:**

- Created Project backlog, Sprint backlog , epics, and user stories with acceptance criteria in Azure devops tool and closely monitored status, team progress and any impediments for immediate resolution.
- Having good hands-on experience on Salesforce Application.
- Active member of all agile ceremonies -refinement, planning, sprint kick-off, daily, sprint review and retrospective.
- Analyzing Business Requirements and Solution Specification documents to design Test Plans, Test Strategies.
- Active member of all agile ceremonies -refinement, planning, sprint kick-off, daily, sprint review and retrospective
- Contributed towards End User configuration and user guide document

**Copado India Pvt. Ltd – (Jun 2021 – Mar 2022)**

**Copado JIRA Integration, Value Stream Mapping | (June 2021 – March 2022)**

Type of Project: Copado Products

Role: Salesforce Test Lead

**Key Tasks and Responsibilities:**

- Managed all QA related activities single-handedly from development stage until production release for the product Copado Connect.
- Helped in releasing backend application package by performing end-to-end Regression and Integration testing.
- Having good hands-on experience on Copado Application.
- Active member of all agile ceremonies -refinement, planning, sprint kick-off, daily, sprint review and retrospective.
- Analyzing Business Requirements and Solution Specification documents to design Test Plans, Test Strategies.

- Involved in preparation of Test Scenarios, Test Cases, Test Data, Test Execution, Results Analyzing and Defects Reporting.

**Accenture Solutions Pvt. Ltd – (Jul 2015 – Jun 2021):**

**DC Dept of Health | DC Dept of Health Contact Tracing (Sep 2020 - Jun2021)**

**Role: Senior QA Tester**

Description - Involved in Preparation of Test Procedures, Test Scenarios, Test Cases and Test Data. Performed Test Execution, Results Analyzing, Defects Reporting and bug triaging. Conducted Test Plan/Test cases review meetings during testing phase.

**AMAP Advertising | Accenture Internal (Jun 2020 – Aug 2020)**

**Project Role: Senior QA Tester**

**Key Tasks and Responsibilities:**

- Lead the Team of 4 QAs Analyzed Business and System Requirements and interacted with users and Developers.
- Worked in Agile Scrum environment.
- Developed System test plans and test scripts based on user requirements and design documents. Created test cases including functional unit test cases, positive and negative.
- Testing with various Salesforce.com standard objects like Reports and Dashboards, Accounts, Contacts, Opportunities and Campaigns.
- Contributed towards End User configuration and user guide document.
- Used JIRA to organize and manage all phases of software testing process including planning tests, executing tests, logging bugs and tracking defects.
- Coordinated with Developers and Testers to resolve and close the defects.
- Helping UAT testers by giving the Screenshots of the functionalities and Test cases flow.
- Created detailed periodic status reports for senior management to keep them posted on the progress.

**SFDC\_ENEL\_PT\_SI | ENEL Italy | (May 2018 – Jun 2020 )**

**Role – Senior QA Tester**

**Key Tasks and Responsibilities:**

- Worked with Cases, Contacts, Accounts, Solutions and Reports entities in Service cloud and community cloud application. Lead the automation team and automated test cases to help in end-to-end testing using Smart Eye Tool (Accenture Internal tool built on Selenium Platform).
- Involved in testing of the application, testing the Tasks and CRs as per the requirement.
- Performed Webservices Testing using SoapUI.
- Used Salesforce Toolkit to organize and manage all phases of software testing process including planning tests, executing tests, logging bugs and tracking defects.
- Played a role in the testing of the integration of an external system with Salesforce.
- Performed Functional, Negative, Positive, Regression, Integration, End to End and User Acceptance Testing.

**National Grid Customer Engagement | National Grid | (Sep 2016 – Apr 2018)**

**Role: QA Engineer**

**Key Tasks and Responsibilities:**

- Develop, execute, and maintain test designs, including test cases and test scripts.
- Develop and maintain test data as necessary to support testing efforts. Involved in testing of the application, testing the user stories as per the requirement.
- Performed Webservices testing using Postman.
- Document test results and communicate to Project Management and other Project Stakeholders.
- Prepared many regression test suites. Contributed to functional end user document preparation.

**QBE Insurance | QBE Insurance | (Jul 2015 – Aug 2016)**

**Role: QA Engineer**

**Key Tasks and Responsibilities:**

- Involved in testing of the application, as per the requirement.
- Handled AM and AME part and been highly appreciated for becoming the SME.
- Handled all type of service requests (Severity level 1-4) and did on call support whenever required. Involved in inter-tower service request handling.

**STATE OF NEW HAMPSHIRE**  
**DIVISION OF PROCUREMENT AND SUPPORT SERVICES**  
**BUREAU OF PURCHASE AND PROPERTY**  
**STATE HOUSE ANNEX**  
**25 CAPITOL STREET**  
**CONCORD, NEW HAMPSHIRE 03301-6398**

DATE OF CHANGE: October 24, 2024

**ADDENDUM # 1 TO REQUEST FOR QUOTE 439-25**

**DATE OF BID CLOSING:** 09/23/2024

**TIME OF BID CLOSING:** 9:00 AM (EST)

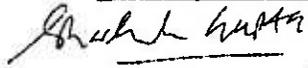
**FOR:** ONLINE LICENSING & CERTIFICATION

**UPDATED INFORMATION:** "Funding available for this RFQ is fixed at \$2.2 million. Any subsequent phases and any related funding will be later."

**PURCHASING AGENT:** Abbie Joy  
**Email:** [NH.Purchasing@das.nh.gov](mailto:NH.Purchasing@das.nh.gov)

NOTE: ALL CHANGES TO BID SOLICITATION NOTED IN ADDENDUMS WILL SUPERSEDE PREVIOUSLY SUBMITTED DOCUMENTS AND MUST BE SUBMITTED WITH THE BID. ALL OTHER SPECIFICATIONS REMAIN UNCHANGED AND VALID.

BIDDER CoreSphere, LLC. ADDRESS 6700A Rockledge Drive, Suite 220, Bethesda, MD 20817

BY  \_\_\_\_\_  
(this document must be signed)  
Shailesh Gupta TEL. NO. 301-830-4035  
(please type or print name)

Please visit: <https://das.nh.gov/purchasing/vendorresources.aspx> (click on "Bid and Proposals") for complete bid and addendums.



**STATE OF NEW HAMPSHIRE  
 DIVISION OF PROCUREMENT AND SUPPORT SERVICES  
 BUREAU OF PURCHASE AND PROPERTY  
 STATE HOUSE ANNEX  
 25 CAPITOL STREET  
 CONCORD, NEW HAMPSHIRE 03301-6398**

Date of Change: October 24, 2024

**ADDENDUM # 2 TO REQUEST FOR QUOTE 439-25**

**DATE OF BID CLOSING:** 09/23/2024

**TIME OF BID CLOSING:** 9:00 AM (EST)

**FOR:** ONLINE LICENSING & CERTIFICATION

**RFQ Cost Proposal:** Please use the accompanying Cost Proposal form to submit your quote.

**RFQ Currently Reads: Page 9, Milestones:**

“The Selected Vendor must meet all milestones during each stage as indicated below and provide the projected delivery dates and pricing details as indicated in Appendix B, Milestones, Deliverables and Pricing Table, attached hereto, and incorporated by reference.”

**RFQ Changed to Read:**

“The Selected Vendor must meet all milestones during each stage as indicated below and provide the projected delivery dates for the project phases indicated on page 7 and detailed throughout this document.”

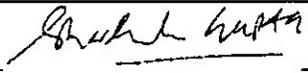
**PURCHASING AGENT: ABIGAIL JOY**

**Email:** [NH.Purchasing@das.nh.gov](mailto:NH.Purchasing@das.nh.gov)

**NOTE: ALL CHANGES TO BID SOLICITATION NOTED IN ADDENDUMS WILL SUPERSEDE PREVIOUSLY SUBMITTED DOCUMENTS AND MUST BE SUBMITTED WITH THE BID. ALL OTHER SPECIFICATIONS REMAIN UNCHANGED AND VALID.**

**RESPONDENT BUSINESS NAME:** CoreSphere, LLC.

**ADDRESS:** 6700A Rockledge Drive, Suite 220, Bethesda, MD 20817

**PRINT NAME:** Shailesh Gupta **SIGNATURE:** 

**TEL. NO.** 301-830-4035 **EMAIL ADDRESS:** sgupta@coresphere.com

**Please visit:** <https://das.nh.gov/purchasing/vendorresources.aspx> (click on “Bid and Proposals”) for complete bid and addendums.



**STATE OF NEW HAMPSHIRE  
DIVISION OF PROCUREMENT AND SUPPORT SERVICES  
BUREAU OF PURCHASE AND PROPERTY  
STATE HOUSE ANNEX  
25 CAPITOL STREET  
CONCORD, NEW HAMPSHIRE 03301-6398**

Date of Change: October 24, 2024

**ADDENDUM # 3 TO REQUEST FOR QUOTE 439-25**

**DATE OF BID CLOSING: 09/23/2024**

**TIME OF BID CLOSING: 9:00 AM (EST)**

**FOR: ONLINE LICENSING & CERTIFICATION**

**TIMELINE CURRENTLY READS:**

<b>Date issued:</b> 09/06/2024 <b>Vendor Q&amp;A submission deadline:</b> 09/11/2024	<b>State response to Q&amp;A deadline:</b> 09/17/2024 <b>Contractor response submission deadline:</b> 09/23/2024 at 9:00 AM
---	--

**TIMELINE CHANGED TO:** Please use the accompanying Cost Proposal form to submit your quote.

<b>Date issued:</b> 09/06/2024 <b>Vendor Q&amp;A submission deadline:</b> 09/18/2024	<b>State response to Q&amp;A deadline:</b> 09/23/2024 <b>Contractor response submission deadline:</b> 09/27/2024 at 9:00 AM
---	--

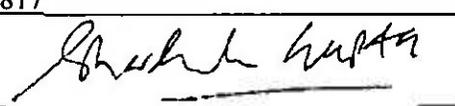
**PURCHASING AGENT: ABIGAIL JOY**

**Email: [NH.Purchasing@das.nh.gov](mailto:NH.Purchasing@das.nh.gov)**

**NOTE: ALL CHANGES TO BID SOLICITATION NOTED IN ADDENDUMS WILL SUPERSEDE PREVIOUSLY SUBMITTED DOCUMENTS AND MUST BE SUBMITTED WITH THE BID. ALL OTHER SPECIFICATIONS REMAIN UNCHANGED AND VALID.**

**RESPONDENT BUSINESS NAME: CoreSphere, LLC.**

**ADDRESS: 6700A Rockledge Drive, Suite 220, Bethesda, MD 20817**

**PRINT NAME: Shailesh Gupta SIGNATURE: **

**TEL. NO. 301-830-4035 EMAIL ADDRESS: sgupta@coresphere.com**

**Please visit: <https://das.nh.gov/purchasing/vendorresources.aspx> (click on "Bid and Proposals") for complete bid and addendums.**



**STATE OF NEW HAMPSHIRE**  
**DIVISION OF PROCUREMENT AND SUPPORT SERVICES**  
BUREAU OF PURCHASE AND PROPERTY  
STATE HOUSE ANNEX  
25 CAPITOL STREET  
CONCORD, NEW HAMPSHIRE 03301-6398

Date of Change: October 24, 2024

**ADDENDUM # 3 TO REQUEST FOR QUOTE 439-25**

**DATE OF BID CLOSING: 09/27/2024**

**TIME OF BID CLOSING: 9:00 AM (EST)**

**FOR: ONLINE LICENSING & CERTIFICATION**

**QUESTION:** Is the labor profile with labor categories presented reflective of the level of effort NH is expecting? Are we allowed to change the labor mix?

**STATE'S RESPONSE:** Once a vendor is selected the incoming SI may need to adjust the team structure to optimize output.

**QUESTION:** What is the yearly hours we should use to calculate rates (1912?)

**STATE'S RESPONSE:** 1900 is safe.

**QUESTION:** Does OPLC have a Phase II implementation deadline (e.g. funding expiration or similar)? Does the \$2.2M mentioned in Addendum 1 have an expiration date?

**STATE'S RESPONSE:** December 25, 2026

**QUESTION:** Does OPLC anticipate the \$2.2M mentioned in Addendum 1 to be the entire funding for Phase II as described in the RFQ?

**STATE'S RESPONSE:** OPLC is unsure at this time if additional funding will be secured.

**QUESTION:** Can OPLC provide the paper form of the 195 applications on Day 1 of the project?

**STATE'S RESPONSE:** Yes.

**QUESTION:** In the "Vendor Team Members" table in RFQ, we note there is a number listed next to each team member title (e.g., "Developers – 4"). Does the OPLC team expect a staffing plan matching the "Vendor Team Members" table in the RFQ, or is this a representative example of how a vendor may staff the project? Similarly, can the roles in the Cost Proposal be changed/added (assuming they still match roles in the MSA pricing table)?

**STATE'S RESPONSE:** Once we select the vendor we will work with the Sis PM to assemble the team which can change throughout the project timeline depending on specific skill sets as needed for each story.

**QUESTION:** For Salesforce configuration (i.e. no access to SoNH data), can we utilize offshore resources?

**STATE'S RESPONSE:** Yes, India and Canada (GH), the SI should not have access to PII data just configure/coding Salesforce. Offshore-no access to UAT or PROD; we are enforcing with other SI teams (MWO)

**QUESTION:** There are 57 Merchant User IDs (MIDs) mentioned in the RFQ. Does this equate to 57 licensure

boards?

**STATE'S RESPONSE:** Yes. This equates to the licensing boards that are set-up online to collect credit cards. This number may decrease or increase.

**QUESTION:** How many different back-end processes for application review?

**STATE'S RESPONSE:** Approximately 8-10, this number may increase or decrease.

**QUESTION:** Will an eSignature solution be implemented in Phase I? What will be used as the eSignature solution (DocuSign, Adobe Sign, etc.)?

**STATE'S RESPONSE:** To be determined. An eSignature solution has not yet been identified.

**QUESTION:** In a previous RFQ, the following list of systems were listed as interfaces. Can OPLC confirm the following list of systems that will need to interface with Salesforce is comprehensive? Do they all need to be integrated during Phase II (the scope of this RFQ)? For example, we note NH State Treasury for Financials was not mentioned in this RFQ.

- a. NH State Treasury for Financials
- b. Veridoc for License Verification
- c. DOS-CBC (State of NH Crime Records Portal)
- d. SOS-Corps (NH Security of State Corporations)
- e. FSBPR (Federation of State Boards of Physical Therapist)
- f. NCARB (National Council of Architectural Registration Boards)
- g. NCSBN (The National Council of State Boards of Nursing)
- h. IMLCC (Interstate Medical Licensure Compact Commission)
- i. FSMB (Federation of State Medical Boards)
- j. NAVLE (North American Veterinary Licensing Examination)
- k. NCEES (National Council of Examiners for Engineering and Surveying)
- l. NAPB (National Association of Boards of Pharmacy®)
- m. CE Broker (Continuing Education Broker)

**STATE'S RESPONSE:** No, this is not a comprehensive list. They do not all need to be integrated during Phase II. There will be no integration to NH State Treasury for Financials.

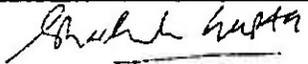
**PURCHASING AGENT: ABIGAIL JOY**

**Email: [NH.Purchasing@das.nh.gov](mailto:NH.Purchasing@das.nh.gov)**

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RESPONDENT BUSINESS NAME: CoreSphere, LLC.

ADDRESS: 6700A Rockledge Drive, Suite 220, Bethesda, MD 20817

PRINT NAME: Shailesh Gupta SIGNATURE: 

TEL. NO. 301-830-4035 EMAIL ADDRESS: sgupta@coresphere.com

Please visit: <https://das.nh.gov/purchasing/vendorresources.aspx> (click on "Bid and Proposals") for complete bid and addendums.

## 2024-075: Cost Proposal

Please fill out the pricing sheet completely. Any software licenses associated with this project can only be purchased by the State of New Hampshire through a third-party contract. In factoring cost, Contractors must use the approved rates within the Statewide MSA.

<u>Implementation Roles</u>	<u>Hourly Rate</u>	<u>Estimated Hours</u>	<u>Project Fees</u>	<u>Location</u>
Solution Architect	\$180.25	564	\$101,661.00	Canada
Scrum Master	\$144.20	1480	\$213,416.00	US
Business Systems Analyst	\$133.90	1480	\$198,172.00	US
Tech Lead	\$180.25	1440	\$259,560.00	US
Salesforce Developer	\$118.45	1240	\$146,878.00	US
Salesforce Developer	\$80.00	560	\$44,800.00	India
Salesforce Developer	\$80.00	840	\$67,200.00	India
Salesforce Developer	\$80.00	560	\$44,800.00	India
Release Manager	\$108.15	660	\$71,379.00	US
QA	\$108.15	1240	\$134,106.00	US
<u>Total Not to Exceed Cost</u>			\$1,281,972.00	

Assumption #	Assumption
1	We assume that the Phase I implementation of the Salesforce Public Sector Solutions (PSS) platform is robust and foundational, providing a stable base for Phase II. As such, we anticipate no need for significant customizations to the existing data model or code. Our approach will focus on leveraging Salesforce's Out-of-the-Box (OOB) features wherever possible, ensuring efficiency and minimizing the need for additional development efforts.
2	The "universal application" template from Phase I will be reused, with conditional sections to manage the unique requirements of 195 licenses and Licenses will be categorized into 10 unique types, each with its own
3	Minor updates to the data model will be required to accommodate additional license-specific fields and
4	Security model updates will be required for 5 profiles, permission sets and roles each.
5	15 workflows will be streamlined using Salesforce's Out-of-the-Box (OOB) features, avoiding custom code where possible.
6	10 reports and 5 dashboards will be created, covering operational, management, statistical, and financial
7	The existing payment framework will be refactored and reused to integrate all 195 licenses, mapped to 57
8	Migration of 200,000 records for Accounts (Individuals) and 200,000 application records from the legacy
9	All work will leverage Salesforce's OOB configurations, with custom development only considered if pre-approved by the Department of Information Technology.
10	Software licenses will be procured by the State.



Charles M. Arlinghaus  
Commissioner

# State of New Hampshire

DEPARTMENT OF ADMINISTRATIVE SERVICES

25 Capitol Street - Room 100  
Concord, New Hampshire 03301  
(603) 271-3201 [Office@das.nh.gov](mailto:Office@das.nh.gov)

52 *MAC*

Catherine A. Keane  
Deputy Commissioner

Sheri L. Rockburn  
Assistant Commissioner

December 20, 2023

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 an amendment to an existing contract (Contract #8002969) with Coresphere, LLC (VC#336219), Bethesda, MD, for salesforce professional services by extending the completion date from December 31, 2023 to December 31, 2024, with no change to the price limitation of \$10,000,000.00 effective upon Governor and Executive Council approval. The original contract (Contract #8002969) was approved by Governor and Executive Council on October 13, 2021, item #97.

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

As previously stated, the original contract (Contract #8002969) was approved by the Governor and Executive Council on October 13, 2021, item #97.

The Department of Administrative Services (DAS), through the Bureau of Purchase and Property (BoPP), issued request for information (RFI) 2024-370 on August 16, 2023, with responses due on August 30, 2023. This RFI reached 41 vendors through the NIGP electronic sourcing platform and one additionally sourced vendor. There were thirteen responses received providing updated pricing and identifying new opportunities in the market. Further assessment of responses received, determined that a one-year extension would be in the best interest of the

State in order to prevent service interruptions for projects while building a new Request for Proposal (RFP) to solicit updated rates and improved services that will fit evolving industry needs.

Upon approval, this requested contract amendment with Coresphere, LLC will allow continued support and services for the Department of Information Technology (DoIT) to support the strategic business objectives of State agencies; to create and sustain a secure and reliable information technology environment; and to ensure careful and responsible management of the State's information technology resources. Not providing this service would increase the probability of shortfalls in all agency-secured information technology environments that would likely create data breaches.

The current spend is \$0.00, and there are no additional funds requested as the current contract price limitation can support the one-year extension. There are no additional funds requested as the current contract price limitation of \$10,000,000.00 can support the one-year extension.

Contract financials	
Original contract price limitation	\$10,000,000.00
Less current spend on contract	\$0.00
Available balance in price limitation	\$10,000,000.00

Based on the foregoing, I am respectfully recommending approval of the contract amendment with Coresphere, LLC.

Respectfully submitted,



Charles M. Arlinghaus  
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](http://www.nh.gov/doit)

**Denis Goulet**  
*Commissioner*

October 31, 2023

Charles M. Arlinghaus, Commissioner  
Department of Administrative Services  
State of New Hampshire  
25 Capitol Street – Room 100  
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 a contract amendment with Brite Systems Inc., Spruce Technology, Inc., Deloitte Consulting LLP, Coresphere, LLC, MTX Group, Tech Mahindra Americas Inc., and Sapient Corporation d/b/a Publicis Sapient, as described below and referenced as DoIT No. 2021-081A.

The purpose of this request is to provide statewide Salesforce Professional Services and for the continued support and services for the Department of Information Technology (DoIT) to support the strategic business objectives of State agencies, to create and sustain a secure and reliable information technology environment, and to ensure careful and responsible management of the State's information technology resources.

The Total Price Limitation will not change and shall remain \$10,000,000, effective upon Governor and Executive Council approval through December 31, 2024.

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

Sincerely,

A handwritten signature in black ink that reads "Denis Goulet".

Denis Goulet

DG/jd  
DoIT #2021-081A

cc: Rebecca Bolton, IT Manager



Division of Procurement Support Services  
Bureau of Purchase Property

Gary S. Lunetta  
Director  
(603) 271-2201

RFI Summary

RFI Description	Saleforce Professional Services	Agency	DoIT
RFI#	2024-21	Vendor	Coresphere, LLC
Agent Name	Claudia Roy	RFI Closing	8/30/2023 @ 9:00 AM

Estimated annual spend	\$0.00
Estimated term spend (Including 1 year extension)	\$0.00
Current price limitation	\$10,000,000.00
Available balance in price limitation	\$10,000,000.00

Recommendation Summary	
Statewide Contract or Amendment	Amendment
Term of Contract	4.00
Price Limitation	\$10,000,000.00
Number of Solicitations Received	13
Number of Sourced bidders	1
Number of NIGP Vendors Sourced	41
Number of non-responsive bidders	29
P-37 Checklist Complete	Yes
D&B Report Attached	NA
Method of Payment (P-card/ACH)	Both
FOB Delivered	Yes

Special Notes:	The current price limitation is \$10,000,000.00. Based on the current spend of \$0.00, there are no additional funds requested as the current contract price limitation can support the one-year extension.
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**FIRST AMENDMENT TO THE CONTRACT  
BETWEEN CORESPHERE, LLC  
AND  
THE STATE OF NEW HAMPSHIRE, DEPARTMENT OF ADMINISTRATIVE SERVICES,  
FOR SALESFORCE PROFESSIONAL SERVICES  
CONTRACT # 8002969**

This First Amendment (hereinafter referred to as the "Amendment"), dated this 1 day of December, 2023, is by and between the State of New Hampshire, Department of Administrative Services (hereinafter referred to as "the State") and Coresphere, LLC (hereinafter referred to as "the Contractor") for Salesforce Professional Services.

WHEREAS, pursuant to an agreement effective October 13, 2021, Item #97, set to expire December 31, 2023, (hereinafter referred to as "the Agreement"), the Contractor agreed to perform certain Salesforce Professional Services for the State in consideration of payment by the State of certain sums as specified therein; and

WHEREAS, pursuant to Section 17 of the Agreement, the Agreement may be amended by an instrument in writing executed by both parties;

NOW, THEREFORE, for and in consideration of the mutual promises set forth in this Amendment and the underlying Agreement, the parties do mutually agree as follows:

1. Delete in its entirety Form Number P-37, item 1.7 Completion Date and substitute the following:

1.7 December 31, 2024

2. Paragraph 2 as set forth in Exhibit C (Pricing Structure) is deleted in its entirety and replaced with the following:

2. Pricing Structure. Contractor shall provide the services at the not-to-exceed hourly rates set forth in the table below.

Position	Hourly Rate
Program Manager	\$164.80
Scrum Master	\$144.20
Salesforce Technical Architect	\$180.25
Salesforce Administrator	\$108.15
Salesforce Platform Developer	\$118.45
Salesforce Data Architect	\$133.90
Salesforce Business Analyst	\$133.90
Salesforce Training Consultant	\$108.15

3. All other provisions of the Agreement, approved by the Governor and Executive Council on October 13, 2021, Item #97, shall remain in full force and effect.

DS  
SG

Coresphere, LLC

DocuSigned by:  
Shailesh Gupta  
77F8240F942AA7...

By: \_\_\_\_\_

Shailesh Gupta

(Print Name)

Title: Managing Partner

Date: 12/1/2023

STATE OF NEW HAMPSHIRE

By: *Charles M. Arlinghaus*

Charles M. Arlinghaus  
(Print Name)

Title: Commissioner  
Department of Administrative Services

Date: 12-6-23

OFFICE OF THE ATTORNEY GENERAL

By: *Duncan A. Edgar*

Duncan A. Edgar  
(Print Name)

Title: Attorney

Date: December 5, 2023

The foregoing contract was approved by  
the Governor and Council of New  
Hampshire on

DEC 20 2023

Signed: *[Signature]*

(Print Name)

THE SECRETARY OF STATE

# 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 CORESPHERE, LLC is a Maryland Limited Liability Company registered to transact business in New Hampshire on October 08, 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: 853049

Certificate Number: 0006321554



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 September A.D. 2023.

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

David M. Scanlan  
Secretary of State



### Limited Partnership or LLC Certification of Authority

I, Shailesh Gupta, hereby certify that I am the Managing Partner and the Managing Member of CoreSphere, LLC limited liability partnership under RSA 304-B, a limited liability professional partnership under RSA 304-D, or a limited liability company under RSA 304-C.

I, Nidhi Gupta, hereby certify that I am a Limited Partner and a Member of CoreSphere, LLC limited liability partnership under RSA 304-B, a limited liability professional partnership under RSA 304-D, or a limited liability company under RSA 304-C.

We certify that we are authorized to bind the partnership or LLC. We further certify that it is understood that the State of New Hampshire will rely on this certificate as evidence that the persons listed above currently occupies the positions indicated and that they have full authority to bind the partnership or LLC and that this authorization shall remain valid for sixty (60) days from the date of this Corporate Resolution.

DATED: 12/1/2023

ATTEST: Shailesh Gupta, Managing Partner

SIGNATURE:

DATED: 12/1/2023

ATTEST: Nidhi Gupta, Member

SIGNATURE:

Note: This authority was/is effective as of 12/1/2023.





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/15/2023

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 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).

<b>PRODUCER</b> AUTOMATIC DATA PROCESSING INS AGCY 76250875 1 ADP BLVD M/S 625 ROSELAND NJ 07068	<b>CONTACT NAME:</b>	
	PHONE (800) 524-7024	FAX
	(A/C, No, Ext):	(A/C, No):
	<b>E-MAIL ADDRESS:</b>	
	<b>INSURER(S) AFFORDING COVERAGE</b>	
	INSURER A: Hartford Fire and Its P&C Affiliates	
<b>INSURED</b> CORESPHERE, LLC 10411 MOTOR CITY DR STE 410 BETHESDA MD 20817-7007	NAIC# 00914	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

**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	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMPROP AGG
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> AUTOS						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE  DED    RETENTION \$						EACH OCCURRENCE AGGREGATE
A	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/A	76 WEG AA2XV9	06/01/2023	06/01/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> 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)  
Those usual to the Insured's Operations.

<b>CERTIFICATE HOLDER</b> State of New Hampshire Administrative Services Bureau of Purchase and Property 25 CAPITOL ST CONCORD NH 03301	<b>CANCELLATION</b> 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>Susan S. Castaneda</i>
--	---

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# State of New Hampshire

DEPARTMENT OF ADMINISTRATIVE SERVICES  
25 Capitol Street - Room 120  
Concord, New Hampshire 03301  
[Office@daa.nh.gov](mailto:Office@daa.nh.gov)

97 ML  
OCT 13 2021

3-2

Charles M. Arlinghaus  
Commissioner  
(603) 271-3201

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

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

August 23, 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 Coresphere, LLC of Bethesda, MD (Vendor No. 336219), 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.

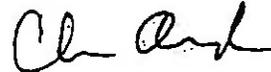
His Excellency, Governor Christopher T. Sununu  
and the Honorable Council  
August 20, 2021  
Page 2 of 2

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 Coresphere, 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 Svc	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](http://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. Slalom, 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.

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/doiit

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

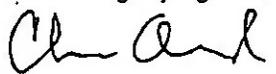
**Notice:** This agreement and all of its attachments shall become public upon submission to Governor and Executive Council for approval. Any information that is private, confidential or proprietary must be clearly identified to the agency and agreed to in writing prior to signing the contract.

**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 CoreSphere, LLC		1.4 Contractor Address 10411 Motor City Drive Suite 410 Bethesda, MD 20817	
1.5 Contractor Phone Number 301-830-4035	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  Date: 06/28/2021		1.12 Name and Title of Contractor Signatory Shailesh Gupta, Managing Partner	
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: <b>OCT 13 2021</b>			



**DEPUTY SECRETARY OF STATE**

**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 CoreSphere, 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 PREPARATION

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.

<p><b>Table III-C: State Recommended Testing Methodology</b></p>
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<p><b>Unit Testing</b></p>	<p>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.</p> <p>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.</p>
<p><b>System Integration Testing</b></p>	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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.</li> </ul>
<p><b>Conversion /Migration Validation Testing</b></p>	<p>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.</p>
<p><b>Installation Testing</b></p>	<p>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.</p>

<p><b>User Acceptance Testing (UAT)</b></p>	<p>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.</p> <ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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</li> </ul> <p>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.</p>
<p><b>Regression Testing</b></p>	<p>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.</p> <p>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.</p> <ul style="list-style-type: none"> <li>a. For each minor failure of an Acceptance Test, the Acceptance Period shall be extended by corresponding time defined in the Test Plan.</li> </ul>

- 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

	consequences of the modification while taking into account Schedule and economic considerations.	
<b>Security Review and Testing</b>	<p>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.</p> <p>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.</p>	
	<b>Service Component</b>	<b>Defines the set of capabilities that:</b>
	<b>Identification and Authentication</b>	Supports obtaining information about those parties attempting to log onto a system or application for security purposes and the validation of users.
	<b>Access Control</b>	Supports the management of permissions for logging onto a computer or network.
	<b>Encryption</b>	Supports the encoding of Data for security purposes
	<b>Intrusion Detection</b>	Supports the detection of illegal entrance into a computer system.
	<b>Verification</b>	Supports the confirmation of authority to enter a computer system, application or network.
	<b>Digital Signature</b>	Guarantees the unaltered state of a file.
	<b>User Management</b>	Supports the administration of computer, application and network accounts within an organization.

<b>Role/Privilege Management</b>	Supports the granting of abilities to users or groups of users of a computer, application or network.
<b>Audit Trail Capture and Analysis</b>	Supports the identification and monitoring of activities within an application or system.
<b>Input Validation</b>	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 as 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 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, Dev-Ops, 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 gather 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:
  - Nature of the Deficiency;
  - Current status of the Deficiency;
  - Action plans, dates, and times;
  - Expected and actual completion time;
  - Deficiency resolution information;
  - Resolved by;
  - Identifying number i.e. work order number; and
  - 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:
  - Mean time between reported Deficiencies with the Software;
  - Diagnosis of the root cause of the problem; and
  - 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.

**xlx. 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 determine 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

<b>Acceptance</b>	Notice from the State that a Deliverable has satisfied Acceptance Test or Review.
<b>Access Control</b>	Supports the management of permissions for logging onto a computer or network.
<b>Appendix</b>	Supplementary material that is collected and appended at the back of a document.
<b>Authorized User</b>	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.
<b>Breach or Breach of Security</b>	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.
<b>Certification</b>	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.
<b>Change Control</b>	Formal process for initiating changes to the proposed Solution or process once development has begun.
<b>Change Control Procedures (CCP)</b>	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.
<b>Change Management</b>	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.
<b>Change Order</b>	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.

<b>CJIS</b>	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.
<b>Cloud/Cloud Government Environment</b>	Refers to all the cloud computing and virtualization products and solutions that are developed specifically for government organizations and institutions.
<b>Completion Date</b>	End date for the Contract.
<b>Computer Security Incident</b>	Means "Computer Security Incident" as stated in Section 2.1 of <u>NIST Publication 800-61 Rev. 2</u> , Computer Security Incident Handling Guide
<b>Confidential Data</b>	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.
<b>Confidential Information</b>	Information required to be kept Confidential from unauthorized disclosure under the Contract.
<b>Contract</b>	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.
<b>Contract Conclusion</b>	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.
<b>Contract Documents</b>	Documents that comprise this Contract.
<b>Contract Managers</b>	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.
<b>Contract Price</b>	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.
<b>Contractor/Contracted Contractor</b>	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.
<b>Cure Period</b>	The thirty (30) day period following written notification of a default within which a Contractor must cure the default identified.
<b>Custom Software</b>	Software developed by the Contractor specifically for a project for the State.
<b>Data</b>	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.
<b>Data Breach</b>	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.
<b>Deficiencies/Defects</b>	A failure, Deficiency or Defect in a Deliverable resulting in a Deliverable, the Software, or the System, not conforming to its Specifications.
<b>Deliverable</b>	A Deliverable is a fully qualified IT consultant provided by the Contractor to the State under the terms of a Contract requirement.
<b>Department</b>	An agency of the State
<b>Department of Administrative Services (DAS)</b>	Responsible for providing innovative leadership, quality statewide management of

	services, and ensuring an efficient/cost-effective state government.
<b>Department of Health and Human Services (DHHS)</b>	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.
<b>Department of Information Technology (DoIT)</b>	The Department of Information Technology established under RSA 21-R by the Legislature effective September 5, 2008.
<b>Derivative Data</b>	Means data or information based on or created from Confidential Data
<b>DevOps</b>	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.
<b>Digital Signature</b>	Certification that guarantees the unaltered state of a file, also known as "code signing".
<b>Documentation</b>	All information that describes the installation, operation, and use of the Software, either in printed or electronic format.
<b>Effective Date</b>	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.
<b>Encryption</b>	Supports the transformation of Data for security purposes.
<b>End User</b>	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.
<b>Enhancements</b>	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.
<b>Fully Loaded</b>	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.
<b>Governor and Executive Council</b>	The New Hampshire Governor and Executive Council.
<b>Health Insurance Portability and Accountability (HIPAA)</b>	Means the Health Insurance Portability and Accountability Act of 1996 and the regulations promulgated thereunder.
<b>Identification and Authentication</b>	Supports obtaining information about those parties attempting to log on to a System or application for security purposes and the validation of those users.
<b>Incident</b>	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.
<b>Input Validation</b>	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.
<b>Intrusion Detection</b>	Supports the detection of illegal entrance into a computer system.
<b>Information Technology (IT)</b>	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.
<b>Key Project Staff</b>	Personnel identified by the State and by the Contractor as essential to work on the Project.
<b>Licensee</b>	The State of New Hampshire
<b>Non Exclusive Contract</b>	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.
<b>Non-Software Deliverables</b>	Deliverables that are not Software Deliverables or Written Deliverables, e.g., meetings, help support, service, other.
<b>Notice to Proceed (NTP)</b>	The State Contract Manager's written direction to the Contractor to begin work on the Contract on a given date and time.
<b>Not to Exceed (NTE)</b>	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.
<b>Open Wireless Network</b>	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.
<b>Operational</b>	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.
<b>Order of Precedence</b>	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.

<b>Personally Identifiable Information (PII)</b>	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
<b>Privacy Breach</b>	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.
<b>Project</b>	The planned undertaking regarding the entire subject matter of this Contract, RFQ/SOW and the activities of the parties related hereto.
<b>Project Team</b>	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.
<b>Project Management Plan</b>	A document that describes the processes and methodology to be employed by the Contractor to ensure a successful project.
<b>Project Managers</b>	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).
<b>Protected Health Information (PHI)</b>	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.
<b>Regression Test Plan</b>	A plan integrated into the Work Plan used to ascertain whether fixes to Defects have

	caused errors elsewhere in the application/process.
<b>Review</b>	The process of reviewing Deliverables for Acceptance.
<b>Review Period</b>	The period set for Review of a Deliverable. If none is specified then the Review Period is five (5) business days.
<b>Role/Privilege Management</b>	Supports the granting of abilities to users or groups of users of a computer, application or network.
<b>Schedule</b>	The dates described in the Work Plan for deadlines for performance of Services and other Project events and activities under the Contract.
<b>Security Rule</b>	Means the Security Standards for the Protection of Electronic Protected Health Information at 45 C.F.R. Part 164, Subpart C, and amendments thereto.
<b>Services</b>	The work or labor to be performed by the Contractor on the Project as described in the Contract.
<b>Software</b>	All custom Software and COTS Software provided by the Contractor under the Contract.
<b>Software Deliverables</b>	The Software provided under this Contract and any Enhancements.
<b>Software License</b>	Licenses provided to the State under this Contract.
<b>Solution</b>	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.
<b>Specifications</b>	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.
<b>Standard Operating Procedure (SOP)</b>	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.
<b>State</b>	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.
<b>Statement of Work (SOW)</b>	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.
<b>State's Confidential Records</b>	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.
<b>State Data</b>	Any information contained within State systems in electronic or paper format.
<b>State Fiscal Year (SFY)</b>	The New Hampshire State Fiscal Year extends from July 1st through June 30th of the following calendar year.

<b>State's Project Manager (PM)</b>	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).
<b>Subcontractor</b>	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.
<b>System</b>	All Software, specified hardware, and interfaces and extensions, integrated and functioning together in accordance with the Specifications.
<b>System Integrator (SI)</b>	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.
<b>TBD</b>	To Be Determined
<b>Term</b>	Period of the Contract from the Effective Date through Contract End Date.
<b>Test Plan</b>	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.
<b>Using Agency</b>	A State of New Hampshire Agency that submitted a request for a quote from vendor(s).
<b>Verification</b>	Supports the confirmation of authority to enter a computer system application or network.
<b>Virtual Private Network (VPN)</b>	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.

<b>Warranty Period</b>	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.
<b>Work Hours</b>	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 <sup>th</sup> , Labor Day, Veterans Day, Thanksgiving Day, the day after Thanksgiving Day, and Christmas Day. Specific dates will be provided upon request.
<b>Work Plan</b>	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	\$160.00	\$160.00	\$164.80
Scrum Master	\$140.00	\$140.00	\$144.20
Salesforce Technical Architect	\$175.00	\$175.00	\$180.25
Salesforce Administrator	\$105.00	\$105.00	\$108.15
Salesforce Platform Developer	\$115.00	\$115.00	\$118.45
Salesforce Data Architect	\$130.00	\$130.00	\$133.90
Salesforce Business Analyst	\$130.00	\$130.00	\$133.90
Salesforce Training Consultant	\$105.00	\$105.00	\$108.15

### **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	
<b>INFORMATION</b>	
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 ○ Staff Title – Text ○ Staff Title – Text	
Sample Work plan and Methodology Required?	Key Contractor Staff Resumes Required?
Compliance Requirements:	
<b>STATEMENT OF WORK</b>	
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:	
<b>PROJECT DELIVERABLES AND MILESTONES</b>	
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.*

*(Limited partnership, Limited liability professional partnership or LLC)*

**Certificate of Authority #3**

**Limited Partnership or LLC Certification of Authority**

I, Shailesh Gupta, hereby certify that I am the sole Partner, Member or  
*(Name)*

Manager and the sole officer of CoreSphere, LLC a limited liability partnership  
*(Name of Partnership or LLC)*

under RSA 304-B, a limited liability professional partnership under RSA 304-D, or a limited liability company under RSA 304-C.

I certify that I am authorized to bind the partnership or LLC. I further certify that it is understood that the State of New Hampshire will rely on this certificate as evidence that the person listed above currently occupies the position indicated and that they have full authority to bind the partnership or LLC and that this authorization shall remain valid for sixty (60) days from the date of this Corporate Resolution.

DocuSigned by:  
Shailesh Gupta  
7FF634DF84EAAA2

**DATED:** 7/16/2021

**ATTEST:** Shailesh Gupta, Managing Partner  
*(Name & Title)*

**Note: This authority was/is effective as of 6/28/2021**

# 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 CORESPHERE, LLC is a Maryland Limited Liability Company registered to transact business in New Hampshire on October 08, 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: 853049

Certificate Number: 0005385506



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 "William M. Gardner".

William M. Gardner  
Secretary of State



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
6/8/2021

**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 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).**

<b>PRODUCER</b>  BIN Insurance Holdings, LLC 30 N. LaSalle, 25th Floor, Chicago, IL 60802	<b>CONTACT NAME:</b> PHONE (A/C No. Ext): (800) 688-1984      FAX (A/C No.): 877-826-9067 E-MAIL ADDRESS: ADDRESS: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> <tr> <td>INSURER A: Philadelphia Indemnity Insurance Company</td> <td style="text-align: center;">18058</td> </tr> <tr> <td>INSURER B: Twin City Fire Insurance Company</td> <td style="text-align: center;">29458</td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Philadelphia Indemnity Insurance Company	18058	INSURER B: Twin City Fire Insurance Company	29458	INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER C:															
INSURER D:															
INSURER E:															
INSURER F:															
<b>INSURED</b>  Coresphere LLC 10411 Motor City Dr Ste 410, Bethesda, MD, 20817															

**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	AGG. SUBR. RSD. WVD.	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Yes	4658AVV1785	6/1/2021	6/1/2022	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMPROP AGG \$ 4,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	Yes	4658AVV1785	6/1/2021	6/1/2022	COMBINED SINGLE LIMIT (Per accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE  DED.    RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	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/A			PER STATUTE    OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability (Errors and Omissions)		PHPCG138638	6/1/2021	6/1/2022	Occurrence/Aggregate \$5,000,000 / \$10,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Certificate Holder is named as Additional Insured as their interests may appear in regards to general liability

<b>CERTIFICATE HOLDER</b>  State of New Hampshire, Administrative Services, Bureau of Purchase and Property, 25 Capitol Street, Room 102, Concord, NH 03301	<b>CANCELLATION</b>  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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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/22/2021

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).

<b>PRODUCER</b> AUTOMATIC DATA PROCESSING INS AGENCY 76250875 1 ADP BLVD M/S 625 ROSELAND NJ 07088	<b>CONTACT NAME:</b> PHONE (800) 624-7024 FAX (800) 524-4013 (A/C, No, Ext) (A/C, No)	
	<b>E-MAIL ADDRESS:</b> INSURER(S) AFFORDING COVERAGE MAJOR	
<b>INSURED</b> CORESPHERE LLC 10411 MOTOR CITY DR STE 410 BETHESDA MD 20817-7007	INSURER A: Hartford Fire and Its P&C Affiliates 00914	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

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	ADOL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Per occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/PROP AGG
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Per accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE AGGREGATE
A	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/A	76 WEG AA2XV9	06/01/2021	06/01/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER 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)  
Those usual to the Insured's Operations.

<b>CERTIFICATE HOLDER</b> State of New Hampshire, Administrative Service, Bureau of Purchase and Property 25 Capitol Street, Room 102 Concord NH 03301	<b>CANCELLATION</b> 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>Susan J. Castaneda</i>

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THE HARTFORD  
BUSINESS SERVICE CENTER  
3600 WISEMAN BLVD  
SAN ANTONIO TX 78251

June 22, 2021

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

**Account Information:**

<b>Policy Holder Details :</b>	CORESPHERE LLC
--------------------------------	----------------



**Contact Us**

Business Service Center  
**Business Hours:** Monday - Friday  
(7AM - 7PM Central Standard Time)  
**Phone:** (877) 287-1316  
**Fax:** (888) 443-6112  
**Email:** [agency.services@thehartford.com](mailto:agency.services@thehartford.com)  
**Website:** <https://business.thehartford.com>

Enclosed please find a Certificate Of Insurance for the above referenced Policyholder. Please contact us if you have any questions or concerns.

Sincerely,  
Your Hartford Service Team

**From:** [Sohrab Zibai](#)  
**To:** [Roy, Claudia](#)  
**Cc:** [Jay Maimudar](#); [Shallesh Gupta](#); [Coresphere Contracts](#)  
**Subject:** RE: [EXTERNAL] Salesforce Contracts  
**Date:** Tuesday, July 25, 2023 1:34:40 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.png](#)  
[image004.png](#)

**EXTERNAL:** Do not open attachments or click on links unless you recognize and trust the sender.

Claudia,

Thanks for your email. Yes, CoreSphere would like to extend our contract.

Also, we've noticed that a project has not come out on this contract vehicle in quite some time. Can you share any insight on when there might be requirements released under this contract in the coming year?

Please confirm receipt if possible, and let me know if you have any other questions for us.

Thanks

Sohrab Zibai

Business Development Manager

[CoreSphere, LLC](#) | a Cloud Innovation Company

[Sohrab.Zibai@Coresphere.com](mailto:Sohrab.Zibai@Coresphere.com)

Cell: (619) 214-0218

[www.coresphere.com](http://www.coresphere.com)

Follow us on LinkedIn, Twitter, Instagram, and Facebook!



The Washington Post



**From:** Roy, Claudia <[Claudia.I.Roy@das.nh.gov](mailto:Claudia.I.Roy@das.nh.gov)>

**Sent:** Tuesday, July 25, 2023 9:43 AM

**Subject:** [EXTERNAL] Salesforce Contracts

**Importance:** High

**This message is from an EXTERNAL SENDER - be CAUTIOUS of links and attachments. THINK BEFORE YOU CLICK.**

Good morning,

I am reviewing the current contracts in place for salesforce professional services and see there is an opportunity to extend for an additional year:

We are obligated to send out an RFI to the public in order to verify we are doing our due diligence to ensure the best price for our taxpayers. While you are not obligated to reply to the RFI, I would like to verify if each of you are interested in extending for an additional year at the same price, terms, and conditions via email.

Please reply to me by 7/31/2023 if you wish to extend or if you wish to not extend your contract after it lapses on 12/31/23.

Thank you for your continued service with the State of New Hampshire.

Claudia Roy  
Senior Purchasing Agent

State of New Hampshire  
Department of Administrative Services  
Division of Procurement & Support Services  
25 Capitol Street,  
Concord, NH 03301  
Email: [Claudia.L.Roy@DAS.NH.gov](mailto:Claudia.L.Roy@DAS.NH.gov)  
Phone: (603) 271-2202