



## REQUEST FOR PROPOSALS

### Enterprise Social Intranet Deployment

**Issue Date: Wednesday, February 11, 2015**

~~**Due Date: Wednesday, February 25, 2015**~~

**Due Date: Wednesday, March 11, 2015**

To be considered, submissions must be signed and returned via email to [dhedgsp@wested.org](mailto:dhedgsp@wested.org). No hard copies will be accepted.

Submissions will be considered valid for a period of 60 calendar days after the submission due date.

# Table of Contents

1. Introduction
  - 1.1.Objectives
2. Background
  - 2.1.Company Background
  - 2.2.Project Background
3. Scope of Work - Discovery and Design
  - 3.1.Needs Assessment
  - 3.2.Intranet Portal
  - 3.3.Salesforce Architecture
  - 3.4.Statement of Work

**Appendix A** - Existing Intranet Features List (.xls) – Business Logic

**Appendix B** - Screen Shots of Existing Intranet

**Appendix C** - Key Interfaces

**Appendix D** - Submission Format

## Key Dates and Timelines

RFP Activity	Dates
RFP Posted	Wednesday, February 11, 2015
Submission start date	Thursday, February 12, 2015
Bidder Questions due by	Wednesday, March 4, 2015
Response to bidder questions posted on WestEd.org	Friday, March 6, 2015
Submission end date	Wednesday, March 11, 2015
Interviews/Demonstrations	Friday, February 13, 2015 – Friday, March 13, 2015
Finalist selection date and Intent to award notice	Monday, March 16, 2015
Protest period	Monday, March 16, 2015 – Friday, March 20, 2015
Award Notice	Monday, March 23, 2015

On-site or virtual interviews are voluntary and open to all bidders. Interviews may be part of the selection process and bidders will have up to 2 hours including set-up, demonstrations, and questions/answers, to interact with WestEd’s Proposal Evaluation Committee. Open dialogue between the bidder and WestEd’s Proposal Evaluation Committee is encouraged.

This request for proposals contains background information on WestEd and specific information that must be included in the submission. An electronic submission is due to [dhedgsp@wested.org](mailto:dhedgsp@wested.org) by 4:00 PM Pacific Standard Time on Wednesday, March 11, 2015.

### 1. Introduction

WestEd invites you to submit a response to this Request for Proposal (“RFP”) for Phase I – Discovery and Design of an Enterprise Social Intranet initiative based on the specifications and requirements set forth in this document.

The new intranet will offer a streamlined approach to WestEd’s internal communications efforts and serve as the primary platform for providing employees with company content, business processes, and an opportunity for collaboration.

Generally, the new intranet will contain the following attributes:

- Easy to use, with customizable pages, sections, dashboards and reports
- Responsive for mobile users
- Flexible workflow and approval functionalities
- Scalable



### 1.1. Objectives

WestEd is seeking a Salesforce service vendor to design, develop, and implement a new Enterprise Social Intranet that will accommodate the use of business systems both native to and integrated with Force.com.

WestEd wishes to take a phased approach in structuring the Enterprise Social Intranet project. Therefore, work on the project is expected to span two or more contracts. The initial phase is intended to be exclusive in order to confirm the project path, define requirements, and design core elements of the new portal. Subsequent phases will cover the implementation of the new design and the migration of key business processes and logic from existing systems into Salesforce.

The outcome of this RFP process will be a contract to support **Phase I - Discovery and Design** with an option to award a contract for Phase II – Implementation, upon WestEd’s acceptance of the Implementation SOW and associated budget.



## 2.0 Background

### 2.1 Company Background

WestEd is a not-for-profit research, development, and service agency that works with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults. WestEd has over 640 employees, located in 16 offices across the United States.

WestEd is a Joint Powers Agency (“JPA”) formed under the California Joint Exercise of Powers Act and governed by public entities in Arizona, California, Nevada, and Utah. WestEd’s Board of Directors is comprised of members representing agencies from these states, as well as other national education and business leaders.



WestEd complies with the required federal regulations on procurement, as well as applicable State procurement laws and procedures. Efforts, including affirmative steps prescribed by federal regulation (if applicable), will be made by WestEd to utilize small and minority-owned businesses and women-led business enterprises.

## **2.2 Project Background**

WestEd's current Intranet was custom developed 10 years ago on Community Servers (CS), and it is managed in-house. WestEd's business applications are either custom built or recently implemented SaaS products. They are siloed applications on various platforms, and they are accessed using single sign-on through the WestEd Intranet.

In 2012, WestEd implemented Apttus for Proposal and Contract Management and purchased a limited number of licenses for CRM Salesforce.com.

In December of 2014, WestEd selected Salesforce.com as a full technology platform to serve as the foundation for redesigning and renewing its Intranet, creating customized solutions, running off-the-shelf applications, improving staff collaboration, integrating with existing service based applications, and leveraging the previous investments made in SaaS solutions such as Box, Smartsheet, and Concur.

The key tenets of WestEd's strategy are focused in the following strategic areas:

1. Intranet Portal/Content Management – Modernizing the set of applications and interfaces to enable Social and Mobile interactions and to take advantage of cloud services. Managing content in a way that is easy to update, search, and maintain. Customizable.
2. Business Applications – Take advantage of key point solutions that are readily available for purchase in order to quickly and easily deploy them to meet business needs. In addition, ability to configure custom applications using built in tools (e.g., workflow, visual aids, dashboards, and reports.)
3. Programmatic Application Development Platform – to enable developers, administrators and business users an environment to create and deploy service-oriented custom applications to address WestEd's programmatic needs.
4. Collaboration – to improve employee, partner, and customer interactions productively in a secure and safe connected environment.



WestEd's current Salesforce environment includes 800 force.com licenses, 400 licenses for Apttus, and 20 CRM licenses, with profiles configured to serve three distinct departments/programs.

### **3. Phase I: Discovery and Design**

#### **3.1 Needs Assessment**

The objectives of the needs assessment are to learn more about WestEd's current business processes, system interfaces, and data elements and to confirm how staff use the current intranet site.

The Needs Assessment should include, but not be limited to the following activities:

- Guide discovery meetings and Interviews with representatives from multiple departments.
- Analyze staff usage of the current intranet site.
- Review current data elements, processes (**Business Logic**), interfaces, and screenshots found in Appendixes A, B, and C.
- Create a comprehensive set of functional requirements specifications that will guide Phase I and Phase II project scopes.
- Create a Systems Architecture plan describing the new intranet and its integration points with the processes and systems listed in Appendix A.
- Assist with defining WestEd's future staffing support requirements.

#### **3.2 Intranet Portal**

Includes designing a new look and feel for a new intranet portal. The new design shall facilitate social collaboration using Salesforce/Chatter and be created using Salesforce.com's Employee Communities.

Associated tasks should include, but are not limited to the following activities:

- Create a simple, modern, and responsive design (UI) for use with Salesforce.com's Employee Communities. The new design should also adhere to WestEd's style guide for websites.
- Create an enhanced User Experience (UX) that is employee-centric and allows for easy navigation and positive user interactions.



- Create page templates that define content layout and functionality for primary department and program pages.
- Create content approval processes for author, editors, and publishers of content for the new site.
- Develop a plan to foster interdepartmental collaboration and community building throughout WestEd's departments and programs.
- Apply a social layer to all department and program pages to allow staff to communicate and collaborate via predefined and adhoc discussion groups.

### **3.3 Salesforce.com Architecture**

Using the requirements specifications developed during the needs assessment, determine appropriate security models, organization-wide settings, roles, profiles, and sharing rules that integrate with or replace the settings in WestEd's Enterprise Edition of Salesforce. The resulting security settings should provide appropriate employee access to the new intranet portal and underlying systems designed in Phase I and allow for easy modification to accommodate employee access to systems developed in Phases II.

This should include, but is not limited to the following activities:

- Determine security model
- Determine organization-wide settings
- Identify roles and profiles
- Develop sharing rules and permission sets
- Create a User management plan

### **3.4 Implementation Statement of Work (SOW)**

By the end of Phase I, WestEd expects that the Salesforce service vendor will have a complete understanding of the current intranet environment and the back-end processes that drive its functionality. With a clear vision of the look and feel, user experience, and functionality of the desired Enterprise Social Intranet, the vendor will create an SOW for a Phase II project. Additional phases may be recommended by the vendor based on a mutual understanding between WestEd and the vendor of the need to further segment the work.

The SOW should include the following:

- Project plan that includes a high-level Roadmap for Phase II and any subsequent phases.



- Detailed implementation plan and timelines for mapping the existing features list **(Business Logic)** that are determined as needed and engineering new processes and workflows in force.com.
- Detailed implementation plan and timelines for providing employee access to existing cloud-based and on-premise **Business Systems** via URL, API, Iframe, etc.
- Recommendations for new interfaces, processes, or third-party applications to meet the goals established in the requirements specifications.
- Plan for additional security settings for Salesforce to properly control employee access to back-end systems.
- Support and Maintenance Plan - Vendors should describe their support and maintenance plan and current rate/fee schedule for additional work outside the scope of the overall project.

### **Notices to Entity(ies)**

All materials provided to WestEd becomes the property of WestEd and it may be returned only at its sole discretion. WestEd is a public entity. All materials submitted may be deemed public records subject to disclosure pursuant to the California Public Records Act. No portion of any submission will be withheld from disclosure as proprietary, trade secret, or confidential unless that portion is clearly marked on the submitted material as such, and the submitter agrees to indemnify WestEd against any claim or action to compel disclosure of such portion of the submitted material.

WestEd is not obligated to accept any submission or to negotiate with any entity. All transactions are subject to final approval of WestEd, which reserves the right to reject any and all submissions without liability. All costs directly or indirectly related to a submission will be borne by the submitting party.

WestEd may, at its discretion, request interviews or presentations by or a meeting with any or all firms to clarify any or all portions of the submission. WestEd does not make any commitments to conduct interviews, presentations, or meetings. Therefore, submissions should contain the most favorable information that the firm can propose.

All specifications, terms and conditions of this proposal may be incorporated into any resulting agreement; therefore, all information submitted must be accurately represented. Submissions





containing false or misleading statements may be rejected if, in WestEd's opinion, the information was intended to mislead WestEd.

### **Compliance with Laws**

All entities submitting a response to this RFP agree that it will comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of REgs., tit. 2, § 72850.0 et seq.). Any respondent, by submitting a response, agrees to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

### **Questions**

Questions or comments regarding this RFP must be in writing and received no later than 4 p.m. on Wednesday, February 18, 2015. Questions should be emailed to Damon Hedgspeth [hedgsp@wested.org](mailto:hedgsp@wested.org). All questions will be responded to in writing. Offeror(s) invited to submit understand and agree that they have an affirmative duty to inquire and seek clarification regarding anything in this RFP that is unclear or open to more than one interpretation.

WestEd, at its sole discretion, may make questions submitted by offerors and responses to the submitted questions available to all offerors.

### **Closing Date and Time**

Proposal submissions, including costs must be delivered via email to Damon Hedgspeth at [dhedgsp@wested.org](mailto:dhedgsp@wested.org) no later than 4:00 PM (Pacific Standard Time) on Wednesday, March 11, 2015.



## **RFP Amendments**

WestEd reserves the right in its sole discretion to revise or amend this RFP prior to the stated submittal deadline. Any such revisions will be made by written addenda to this RFP. Proposers are responsible for verifying they have received, and all proposals shall acknowledge receipt of, all addenda issued by WestEd relating to this RFP. Failure to acknowledge receipt of all such addenda may render a proposal nonresponsive

In the event that modifications, clarifications, or additions to this RFP become necessary, all RFP amendments will be posted to WestEd's website ([www.wested.org](http://www.wested.org)).

## **WestEd Point of Contact**

The RFP Coordinator is the sole point of contact at WestEd for this submission. All communication between the Entity and WestEd, upon release of the RFP, will be with the RFP Coordinator, as follows:

Name: Damon Hedgspeth

Title: Vendor Relationship Lead

Email: [dhedgsp@wested.org](mailto:dhedgsp@wested.org)

## **Submission Format**

The Entity shall submit a proposal that clearly, concisely and accurately describes the Entity's response to the RFP. Entity must submit their response in the following manner, using the Submission Template in Appendix D to be considered.

## **Cost Proposal**

WestEd anticipates establishing a set rate schedule under a Master Services Agreement with the selected vendor for the period ending Nov 30, 2015. In anticipation of this process, responding vendors are required to include the following information in their response.

- A schedule of hourly rates and rate categories to be charged by personnel.
- A cost proposal for the Technical Consulting Services which includes a list, by type and amount, of any additional fees, overhead charges, or reimbursable expenses, if any.

## Appendix A

### Existing Intranet Features List

Appendix A has been moved to the “intranet\_features\_list.xls” excel document.

# Appendix B

## Screen Shots of Existing Intranet

Figure 1 – Main Landing Page



Figure 2 – HR Department Landing Page

WestEd Intranet

Welcome, [User] • My Profile • Logout • Help

Staff [Search] GO

Advanced Staff Search

HOME AGENCY DEPARTMENTS FORMS PROPOSALS & AWARDS Cost Codes Procurement Other BUSINESS TOOLS

Add to Quick Links

## HUMAN RESOURCES

**HOW TO GET HELP**

FAQs on a variety of topics **Frequently Asked Questions**

All HR forms in one place **HR Forms**

WestEd Policy & Procedure Manual **Policy & Procedures**

Contact us

**POPULAR PAGES**

**Benefits**

- » Open Enrollment
- » Health Insurance
- » Paid Time Off & Holidays

**Hiring**

- » Regular Employees & Temps
- » Open Job Postings

**Job Performance & Advancement**

- » Performance Evaluation & Planning
- » Professional Development

**NEWS & ANNOUNCEMENTS**

» All HR News

**Next Job Description Questionnaires Due February 27**  
01/28/2015

**HR Announces Exciting Retirement Plan Changes**  
01/14/2015

**View Archive of Recent Improvement Science Webinar**  
01/07/2015

**STAFF SPOTLIGHT** » All Staff

**Human Resources**  
Resources Manager, is the primary business partner for various programs and departments, ... [Read More](#)

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Figure 3 – Purchase Request Form



WestEd Intranet

HOME AGENCY DEPARTMENTS FORMS PROPOSALS & AWARDS Cost Codes Procurement Other BUSINESS TOOLS

Welcome, [User] My Profile Logout Help

Staff [Search] GO

Advanced Staff Search

Add to Quick Links

### New Purchase Request or Check for Vendor

**Go to Concur for Staff Reimbursement Requests**

This form is no longer used to request reimbursement for staff, EXCEPT see [Phone & Voicemail - Home Office help page](#) if you need to request reimbursement for telecom or internet service. For all other reimbursements, go to [Concur](#) to create a New Expense Report.

**Request Name \*** (e.g., Keyboard for Jane Doe)

**Person the request is for \*** (This list is limited to you and anyone who has chosen you as a delegate. On the next screen you will have this person's cost codes to choose from.)

**Note about new hires:** If you are requesting on behalf of a new hire who has not started work yet, email the [redacted] to get set up as the delegate so you can place an order for them. If the new employee is not yet in WestEd's system, you may purchase the equipment with yourself as the requester. Put their name and the fact that they are a new hire, in the title of the request. It is then your responsibility to ensure this equipment is transferred to the new employee, by contacting the IS Help Desk.

For **cell phones**, see the [Cell Phone Allowance](#) help page.

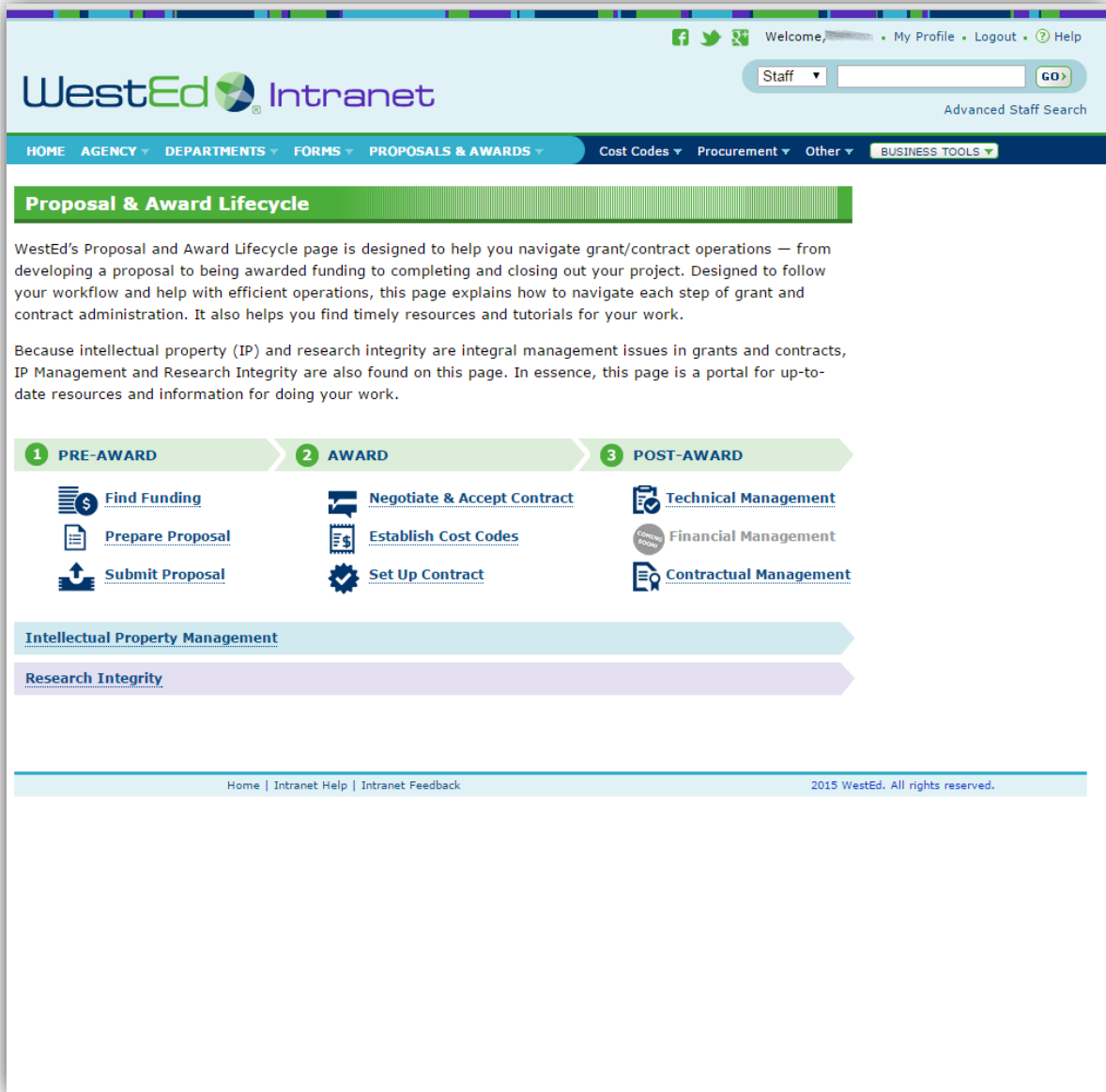
**Type of Request \***

- Services and Supplies
  - General project or program supplies
  - Hotel contracts (for workshops and conferences)
  - Catering services
  - Registration / attendance fees (for workshops and conferences)
  - Research materials
  - Subscriptions
  - External / 3rd party printing
  - Membership / educational fees
  - Outside rentals
  - Other professional services (e.g. video / audio editing)
- Computer and Communications Hardware
  - Accessories Kits - (Mac/Windows - Mouse, Keyboard, Monitor)
  - Computer Laptop Kits (Mac/Windows, Non-Travel/Travel)
  - iPad Air Kit
  - High-Demand Standard Individual Items
  - IS Consult for Special Orders
- Computer Software
  - Standard software (e.g. Microsoft Office)
  - Non-standard software (e.g. SPSS, SAS)
- Office Equipment and Furniture
  - Tables, chairs, shelves, etc.
  - Refrigerators, microwaves and other appliances
  - Binding machines and shredders

**Note:** Selecting "Save" creates a new purchase request, even though you have not filled in the details yet. Please select "Save" only if you plan to continue.

Save

Figure 4 – Proposal & Awards Lifecycles (Static Content)



WestEd Intranet

HOME AGENCY DEPARTMENTS FORMS PROPOSALS & AWARDS Cost Codes Procurement Other BUSINESS TOOLS

### Proposal & Award Lifecycle

WestEd's Proposal and Award Lifecycle page is designed to help you navigate grant/contract operations — from developing a proposal to being awarded funding to completing and closing out your project. Designed to follow your workflow and help with efficient operations, this page explains how to navigate each step of grant and contract administration. It also helps you find timely resources and tutorials for your work.

Because intellectual property (IP) and research integrity are integral management issues in grants and contracts, IP Management and Research Integrity are also found on this page. In essence, this page is a portal for up-to-date resources and information for doing your work.

1 PRE-AWARD	2 AWARD	3 POST-AWARD
<ul style="list-style-type: none"> <li>Find Funding</li> <li>Prepare Proposal</li> <li>Submit Proposal</li> </ul>	<ul style="list-style-type: none"> <li>Negotiate &amp; Accept Contract</li> <li>Establish Cost Codes</li> <li>Set Up Contract</li> </ul>	<ul style="list-style-type: none"> <li>Technical Management</li> <li>Financial Management</li> <li>Contractual Management</li> </ul>

[Intellectual Property Management](#)  
[Research Integrity](#)

Home | Intranet Help | Intranet Feedback 2015 WestEd. All rights reserved.

Figure 5 – Timesheet Form

Welcome, [User] · My Profile · Logout · Help

Staff   Advanced Staff Search

**WestEd Intranet**

HOME AGENCY DEPARTMENTS FORMS PROPOSALS & AWARDS Cost Codes Procurement Other BUSINESS TOOLS

### Timesheet: Create New Timesheet

[← back to Timesheet Menu](#)

[User]'s Timesheet for Week Ending 02/13/2015

Current  Requires Attention

01/23 01/30 02/06 02/13 02/20 02/27 03/06

Cost Code	Sat 02/07	Sun 02/08	Mon 02/09	Tue 02/10	Wed 02/11	Thu 02/12	Fri 02/13	Cost Code
0621.01.001 Help Desk								0621.01.001 Help Desk
0621.02.001 Ntwk Infra								0621.02.001 Ntwk Infra
0621.03.001 Sys Infra								0621.03.001 Sys Infra
0621.05.001 Strat Plan								0621.05.001 Strat Plan
0621.05.002 Bus & PD								0621.05.002 Bus & PD
0621.06.001 Bus Applic								0621.06.001 Bus Applic
0250.410 Vacation								0250.410 Vacation
0450.015 Sick								0450.015 Sick
0450.020 Holiday								0450.020 Holiday
0450.035 Jury Duty								0450.035 Jury Duty
0450.040 Bereavemen								0450.040 Bereavemen
Cost Code	Sat 02/07	Sun 02/08	Mon 02/09	Tue 02/10	Wed 02/11	Thu 02/12	Fri 02/13	Cost Code

Cost Code Color Key

1234.00.000 Current | 1234.00.000 Will expire w/in 60 days | 1234.00.000 Expired (will show for 14 days)

Employee's Comments to Accounting

Employee's Comments to Self (Private)



## Appendix C

### Key Interfaces

1. Nightly update from Accounting Deltek/Costpoint software to Intranet user table. Intranet is "master" for some user data, while Costpoint is "master" for other, e.g. employee status, hire date, and termination date.
2. Nightly or on-demand update from Accounting Deltek/Costpoint software to Intranet cost code table. Intranet is "master" for some cost code data, while Costpoint is "master" for other, e.g. status and expiration date.
3. Nightly feed from Island (Ruby app built specifically to interface between Intranet and SaaS applications) to Concur to create or deactivate user accounts in Concur, according to Intranet user data.
4. Nightly feed from Island to Desk (desk.com) of all active intranet users, to Desk's customer table.
5. Ongoing (e.g. every 5 mins) from Island to Intranet to pass information from Apttus about contracts (aka agreements) to Intranet, for use in managing cost codes on Intranet.
6. Ongoing (e.g. every 5 mins) from Intranet to Island to pass information about cost codes over to Apttus. (Island is the intermediary.)
7. Nightly update from Intranet to Cognos (or datamart?) of cost codes and cost code-user relationships, to provide the structure Cognos relies on for permissions, in order to show the right staff the right financial reports.

## Appendix D

### Submission Outline

In order to simplify the review process and to obtain the maximum degree of comparability, the proposal should include the following items and be organized in the manner specified below.

#### **Letter of Transmittal**

A letter of transmittal briefly outlining the firm's understanding of the work and general information regarding the firm and individuals to be involved is limited to a maximum of two pages. The letter should clearly identify the local address of the office of the firm performing the work, the telephone number, and the name of the authorized representative. The letter shall include a clear statement from Proposer that this offer is binding and shall remain open for 60 days from the due date of this RFP and acknowledges that its proposal cannot be withdrawn within that time without the written consent of WestEd.

#### **Table of Contents**

Include a table of contents that identifies the material by section, page number, and a reference to the information to be contained in the proposal.

#### **Profile of Firm Proposing (2 pages maximum)**

- Indicate the size of the professional staff by level, such as partner, manager, supervisor, etc.
- Indicate the number of companies/organizations in which the proposed solution of similar size/scope has been implemented. What is the total number of users for the solution?
- Indicate proposed subcontractors for the performance of the potential contract.

#### **References (1 page)**

- Include a list of at least three contracts you have had during the last five years that relate to your ability to perform the services needed under this RFQ. Describe the project and scope of work, list contract reference numbers (if applicable), contract period of performance, and contract budget.
- By submitting a proposal in response to this Request, the entity and team members grant permission to WestEd to contact these references and others, who from WestEd's perspective, may have pertinent information. WestEd may or may not, at WestEd's discretion, contact and /or evaluate references.



### **Scope of Work (2 pages maximum)**

Briefly describe the firm's understanding of the scope of services to be provided. Use the components in the RFP to guide the description.

### **Documentation (1 page maximum)**

Describe the types of user and technical documentation provided with the product/service, (e.g., job-aids, user manuals, quick reference cards, online support, etc.).

### **Proposed Project Schedule**

Provide a proposed project schedule including major milestones for Phase I – Discovery and Design.

### **Fees and Compensation**

Provide the following information as relevant to the fee proposal:

- Estimated total hours.
- Estimated out-of-pocket expenses.
- The hourly rate by staff classification.
- The all-inclusive maximum fee and out-of-pocket expenses, which will not be exceeded.
- The frequency and timing of the firm's billing process.