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Competitive Solicitation RFP # 2323-833 Attachment D, Bidder Response Form

Bidder Name CoreSphere, LLC.

	53-55	Service Level Agreements	Company Confidential	
	56-66	Project Management Methodology	Company Confidential	
	66-157	Solution Offering	Company Proprietary Information	
	158-161	Pricing	Company Confidential	
F	Please indicate whether you have had a contract terminated for cause or default within the past five (5) years. If so, please provide the terminating party's name, address and telephone number and provide a summary describing the alleged deficiencies in Bidder's performance, whether and how these alleged deficiencies were remedied and any other information pertinent to Bidder's position on the matter. "Termination for Cause" refers to any notice to Bidder to stop performance due to Bidder's asserted nonperformance or poor performance and the issue was either (a) not litigated; (b) litigated with a resulting determination in favor of the other party; or (c) is the subject of pending litigation.			NOT SCORED
	ANSWER: No.			
G	Please identify any prior contracts Bidder has entered into with the State of Washington within the past ten (10) years and identify the dates and nature of the contract and primary agency contact for each.			NOT SCORED
	ANSWER: None.			
H	Please indicate whether Bidder has been the subject of a lawsuit or administrative proceeding alleging a failure to comply with laws relating to the types of services Bidder proposes to provide pursuant to this Competitive Solicitation. If the answer is yes, please list the nature of the allegations, docket number, disposition and date (if applicable) and Bidder's explanation of how it has changed its practices or operations relative to any alleged deficiencies since that proceeding was filed.			NOT SCORED
	ANSWER: None.			
I	Please describe your proposed plans for the use of Subcontractors in performing this Contract, listing each Subcontractor, its proposed role, and the estimated percentage of the Contract that will be performed by each Subcontractor. Please indicate whether each Subcontractor self-identifies or is certified as a Washington small business, a minority-owned business, a woman-owned business, a disadvantaged business enterprise, or a veteran-owned business. If the answer is yes, please identify the type of organization(s) and provide details of any certifications. Note that all Subcontractors must be approved by DSHS.			NOT SCORED
	ANSWER: CoreSphere will not be using subcontractors.			
J	Please describe any programs, policies or activities of your organization that support human health and environmental sustainability in your business practices. If a program, policy or activity is specifically applicable to this Contract, please indicate so.			NOT SCORED
	ANSWER:			

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	CoreSphere Human Resources supports the well-being of our employees through a wide variety of programs including self-meditation classes, yoga classes and other events that promote employee health. These programs are free to employees. Our health insurance provider CareFirst also offers wellness benefits. 1 st we provide Noo, app to assist employees in maintaining healthy weight. We offer health coaching and behavioral health digital resources. From an environmental sustainability perspective each employee has opted to go green for ADP which means that payroll/retirement documents are either stored online or sent by email instead of mailed whenever not mandated by federal/state law. Same for benefits with Kelly Benefit portal it is all online.	
K	<p>License Agreement: Bidders must include a License Agreement for the Solution and label as Schedule-License Agreement in its bid proposal.</p> <p>Note: The License Agreement should only include licensing terms and should not include any terms that conflict with the Contract terms (e.g. payment terms). Bidder's License Agreement should include full use of the Solution by the agency's authorized users and there should not be any separate end-user license agreement required or included with Bidder's proposal. For third-party products that are being proposed as part of the overall Solution, Bidder must include any end-user license agreements that will be required to access and use such products.</p> <p>a. Please provide a copy of your License Agreement for the Solution.</p>	NOT SCORED
	<p>ANSWER:</p> <p>Licensee agrees that any order for Salesforce Services will be governed by the terms and conditions of the Carahsoft Salesforce Service Terms, copies of which are found at https://carah.io/SFDC-TOU</p> <p>and all Schedules and Documentation referenced by the Terms are made a part hereof. The parties agree that any term or condition stated in a Customer purchase order or in any other Customer order documentation (excluding Quotes) is void. In the event of any conflict or inconsistency among the following documents, the order of precedence shall be: (1) the applicable Quotes (and their Contract Vehicle), (2) the TOU, and (3) the Documentation. Licensee acknowledges it has had the opportunity to review the Terms, prior to executing an order.</p> <p>Product Terms Directory: http://carah.io/Product-Terms-Directory Help & Training: http://carah.io/Help</p>	

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<p>Government Cloud Plus: http://www.carahsoft.com/government-cloud-terms</p> <p>A list of currently available FedRAMP/IL4 Authorized Salesforce products can be found here: https://help.salesforce.com/articleView?id=000270080&language=en_US&type=1</p> <p><u>CareSphere Solution/Accelerator</u></p> <p>The CareSphere Solution/Accelerator is pre-existing work and the intellectual property of CoreSphere, LLC and owned by CoreSphere, LLC. The structure, organization and code are the valuable trade secrets and confidential information of CoreSphere, LLC. The CareSphere Software is protected by law, including but not limited to the copyright laws of the United States and other countries, and by international treaty provisions. The Customer shall not reverse engineer, decompile or disassemble the object code version of the CareSphere Solution/Accelerator without the prior written approval of CoreSphere, LLC. Customer may not copy, reproduce, distribute, create derivative works of the CareSphere Solution/Accelerator. This agreement does not grant you any intellectual property rights in the CareSphere Solution/Accelerator and all rights not expressly granted are reserved by CoreSphere, LLC. CoreSphere grants the customer consent to utilize it solely for this solution and project. Any use of the CareSphere Solution/Accelerator without CoreSphere's express written consent is prohibited.</p> <p>Only Services on this Order Form that are identified by SKU in the Government Cloud Plus Products list available at https://www.salesforce.com/company/legal/agreements/, as updated from time to time, are Government Cloud Plus Products. All other Services are non-Government Cloud Plus products. The Government Cloud Available Products and Features Knowledge Article available at https://help.salesforce.com/articleView?id=000321821&type=1&mode=1 ("Knowledge Article") identifies "Interoperable (but not authorized)" products and features which are compatible with Government Cloud Plus Products, in the manner as described in the Documentation. Customer has sole responsibility, prior to using new products or features with Government Cloud Plus Products, to determine if such products or features are within the Government Cloud Plus authorization boundary, as described in the Knowledge Article, and for maintaining the settings in its Salesforce Government Cloud Plus Org for the Org to remain compliant with the Government Cloud Plus authorizations. Salesforce provides customers with a Configuration User Guide available at https://publicsector-compliance-us.my.salesforce.com/</p>	
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<p>to assist with the setup and configuration process. "Org" means a unique instance of the Services, i.e., a separate set of Customer Data and Customer-specific Service customizations held by SFDC in a logically separated database (i.e., a database segregated through password-controlled access). Customer acknowledges that the "Interoperable (but not authorized)" products and features, as well as any Non-SFDC Applications that interoperate with the Customer's Salesforce Government Cloud Plus Org, fall outside of the Government Cloud Plus authorization boundary. Considering the foregoing, Customer understands and agrees that its Customer Data will be shared with "Interoperable (but not yet authorized)" products and features and Non-SFDC Applications that interoperate with its Salesforce Government Cloud Plus Org.</p> <p><u>Salesforce Shield</u></p> <p>In order to use the Data Detect features, Customer's system administrator must first install the managed package available at: https://sfdc.co/install-datadetect.</p> <p><u>Government Cloud Plus</u></p> <p>The Government Cloud Plus subscription: (i) provides an isolated infrastructure for hosting authorized Salesforce Services, with additional controls specifically for US government customers and US government contractors, as further described in the Trust and Compliance Documentation (available at https://www.salesforce.com/company/legal/trust-and-compliance-documentation/); and (ii) amends and supplements the Premier Success Plan (available at https://sfdc.co/bDsV6q) for Services available on the Government Cloud Plus infrastructure as set forth below. The terms in the Premier Success Plan shall apply, except as otherwise set forth herein. For the purposes of this Product Special Term, "Qualified US Citizens" are individuals who: (1) are United States citizens; (2) are physically located within the United States while providing Premier Support Services; and (3) have completed a background check as a condition of their employment with Salesforce. Submitting a Case: Users can submit support cases as described in the Premier Success Plan. Cases submitted via the Help portal will automatically be routed to Qualified US Citizens. Cases submitted outside of the Help portal (e.g. via telephone or chat, when available) will not be responded to by Qualified US Citizens. These individuals will route cases to a team of Qualified US Citizens and will access the following information about Users to route the calls to Qualified US Citizens: first and last name, email address, username, phone number, and physical business address. All support is provided in English only. All personnel engaged outside of the Help portal, including those in customer success roles or providing customer success services (e.g. Expert Coaching, Expert Office Hours), will not</p>	
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	<p>be Qualified US Citizens and will only have access to Customer Data if Customer provides such personnel a User ID or otherwise enables the sharing of Customer Data with such personnel.</p> <p>Any increase in subscription pricing (excluding support and resource-based Services) for the first renewal term will be in accordance with SFDC's pricing and policies in effect at the time of the renewal or as otherwise agreed to by the parties or noted in these quote terms or contract.</p>	
L	Please describe any experience you have had working with organizations serving refugees and immigrants.	NOT SCORED
	<p>ANSWER:</p> <p>CoreSphere is currently implementing its CareSphere solution based on Salesforce for the state of North Dakota, Department of Health and Human Services, Office of Refugee Support Services, Refugee Programs Data Management System. We expect our solution to go live in July 2024. CoreSphere has a very strong understanding of the overall process, eligibility requirements, and services such as RCA, RMS, RMA, etc. We will be able to bring this knowledge, experience, and solution to Washinton to deliver a solution rapidly to Washington State.</p>	
M	Please fully describe any assumptions Bidder has made that affect its proposed total charges, if those assumptions are not explicitly addressed in Attachment A, Sample Contract. Include any unknowns or elements that you are aware of, which are addressed in the RFP that may impact (increase or decrease) cost.	NOT SCORED
	<p>ANSWER:</p> <p>The following are CoreSphere's pricing notes and assumptions:</p> <ol style="list-style-type: none"> 1. Application functionality priced is for requirements provided in the RFP. 2. All work will be performed remotely and any onsite meetings and sessions such as training etc. will only be scheduled if safe during the COVID-19 pandemic. 3. Washington State representatives shall be available as necessary to, among other things, attend meetings, provide feedback, approve deliverables, validate findings, and test Deliverables as appropriate. 4. Tasks, meetings, and reviews that require the input of the State personnel may impact delivery and costs of Team CoreSphere deliverables if not met within the scheduled timeframes. 5. The State will review and approve all submitted deliverables within five (5) business days. 6. The State will provide classrooms, internet connectivity, projectors, desktop/laptop computers for students 	

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	<p>and other equipment as needed for Classroom based training.</p> <p>7. Reproduction, shipping, and distribution of any training materials will be the responsibility of the State.</p> <p>8. All License subscriptions will be invoiced at the beginning of the Year in full (at Contract Award for Year 1 and at Renewal to procure/renew Cloud Software License Subscriptions.</p> <p>9. Proposed License subscriptions require an Annual Commitment. Once purchased/renewed with an annual commitment these fees are Non-Refundable.</p> <p>10. Implementation, Training, Integration Services will be invoiced monthly on an agreed upon Payment Schedule on a Net 30 basis.</p> <p>11. Data Migration is limited to data from MyRIA and eJAS. ORIA will provide data in a machine-readable format from these systems to be imported into the new Refugee Case Management System.</p> <p>12. ORIA will consolidate spreadsheets for import as much as possible, preferably one per Provider for import.</p> <p>13. Our import excludes any manual data cleansing required.</p> <p>14. Digital Signatures included in our pricing are for the proposed option of utilizing a Mouse or Fingers on a touchscreen display to sign. Use of an eSign product such as Adobe Sign or DocuSign is excluded.</p> <p>15. Maintenance and Support will be invoiced on a prorated monthly basis on a Net 30 basis.</p> <p>16. Maintenance and Support Fees are based on the following terms:</p> <ul style="list-style-type: none"> • Tier 1 User Support is excluded in our Price. • Tier 2 and Tier 3 support is included to resolve system and application issues. • Software upgrades as released are included. • Software administration to ensure performance, uptime, and scalability are included. • 5 Days x 10 Hours web based and telephone support for Tier 2 and Tier 3 is included. • User Administration and Management is excluded. CoreSphere will train designated State personnel on Activating and Deactivating users. • Major enhancements can be provided at a separate cost based on Hourly Rates. <p>17. The State will reimburse CoreSphere for any Travel required for onsite meetings or onsite Training.</p> <p>18. Licenses are governed by the licensing terms included in the "Product Licensing Terms" below.</p>	
N	<p>Bidder should also propose a schedule of payments corresponding to its charges for successfully performing the tasks necessary to accomplish identified milestones corresponding to project objectives and performance measures within each phase. Bidders are required to collect and pay Washington State sales tax, if applicable.</p>	NOT SCORED

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	(\$7,000,000) annually as reported on Bidder's federal income tax return or its return filed with the Washington State Department of Revenue over the previous three consecutive years. c. <i>WEBS Certification.</i> Bidder must have certified its Washington Small Business status in Washington's Electronic Business Solution (WEBS).	
	ANSWER: Not at this time.	
4	BIDDER CERTIFICATION – CERTIFIED WASHINGTON VETERAN-OWNED BUSINESS	
A	<p>Are you a Certified Washington Veteran-Owned Business as defined under RCW 43.60A.190?</p> <p>According to Chapter 43.60A.190 RCW, to qualify as a Certified Washington Veteran-Owned Business, Bidder must meet four requirements:</p> <ul style="list-style-type: none"> a. <i>51% Ownership. Bidder must be at least fifty-one percent (51%) owned and controlled by:</i> <ul style="list-style-type: none"> 1. <i>A veteran is defined as every person who at the time he or she seeks certification has received a discharge with an honorable characterization or received a discharge for medical reasons with an honorable record, where applicable, and who has served in at least one of the capacities listed in RCW 41.04.007;</i> 2. <i>A person who is in receipt of disability compensation or pension from the Department of Veteran's Affairs; or</i> 3. <i>An active or reserve member in any branch of the armed forces of the United States, including the national guard, coast guard, and armed forces reserves.</i> b. <i>Washington Incorporation/Location. Bidder must be <u>either</u> an entity that is incorporated in the state of Washington as a Washington domestic corporation <u>or, if not incorporated</u>, an entity whose principal place of business is located within the State of Washington.</i> c. <i>WEBS Certification. Bidder must have certified its Veteran-Owned business status in Washington's Electronic Business Solution (WEBS).</i> d. <i>WDVA Certification. Bidder must have provided certification documentation to the Washington Department of Veterans' Affairs (WDVA) and be certified by WDVA and listed as such on WDVA's website (WDVA – Veteran-Owned Businesses).</i> 	NOT SCORED
	ANSWER: Not at this time.	

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5	BIDDER QUALIFICATIONS AND EXPERIENCE (MANAGEMENT RESPONSE)	MAXIMUM TOTAL POINTS: 34
A	<p>Please describe the experiences, skills and qualifications your organization possesses that are relevant to your ability to perform the Contract that is the subject of this Solicitation. Please include all information that demonstrates your organization's ability to fulfill ORIA's business needs for a case management and database system. Please include any relevant experience that distinguishes your organization or makes your proposed Solution and your services uniquely qualified for the Contract.</p>	6
	<p>ANSWER:</p> <p>CoreSphere, LLC., founded in 2003, is a Small Business headquartered in Bethesda, Maryland. We are an innovative and fast-growing company helping public and private sector customers transform into high performing cloud-enabled enterprises. Utilizing an agile approach, we deliver modular, mission critical solutions that transform the enterprise through digital modernization.</p> <p>Focusing on the public sector, we have a presence in over 20 public sector agencies and are leading as a Prime on 95% of our projects. Our solutions span today's leading commercial and applications and development tools. Our mission is helping our clients transform their future through innovation. Among partners in the industry, we have a stellar reputation as a reliable, capable firm that is easy to do business with. We were recognized by the 2019 CRN Tech Elite 250, a definitive list of solution providers with deep technical expertise and premier certifications; and we were also recognized by Forrester as a "Go To" Federal systems integrator in 2017. We were also selected by the Washington Post as a Top Workplace in 2018, 2021 and 2023.</p> <p>CoreSphere has designed, architected, advised on, managed, implemented, integrated, trained on and tested many systems for an extremely diverse set of clients. We have extensive experience as a Prime contractor, where we have managed highly visible, mission-critical programs to ensure maximum application performance and system optimization; and as a subcontractor where we have provided a wide range of support services with our teammates.</p> <div data-bbox="1323 662 1732 1031">  <p>THE CHANNEL CO. CRN TECH ELITE 250</p> <p>TOP WORK PLACES 2023 The Washington Post</p> </div>	

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	The above-listed components will be part of the acceptance request and the ORIA approval on all these components will be deemed mandatory for CoreSphere.	
G	Describe any past experiences you have had working with an organization to develop a system with configuration capabilities, which could nimbly respond with minimal vendor support in a fluid environment, such as when services, policies, needs or Congressional/Legislative mandates change.	6
	<p>ANSWER:</p> <p>The CoreSphere solution proposed for ORIA is based on the Salesforce Platform with our CareSphere Accelerator. The CareSphere accelerator has been implemented in multiple client environments and we take pride in the fact that there are many items that can be managed by our customers without the need for CoreSphere. ORIA can configure the Solution, including setting up new programs within it easily. That is the true value of the CareSphere Accelerator as it has been designed to be highly configurable and data drive. Examples of elements within CareSphere that ORIA can perform using drag and drop types of features are:</p> <ul style="list-style-type: none"> • Add new Providers, Provider Facilities, etc. • Add new Programs (Catalog Services) • Add New Services and which Provider will be delivering these services (please see response to section 7(G)(a) on how Services can be Configured to collect Service specific data • Create and modify Forms • Create and modify Assessments. • Create and modify Action Plans (Task Templates) • Add new Fields and Update Drop down list values • Create or Update notification templates • Create and modify Reports and Dashboards 	
6	BIDDER's PROPOSED APPROACH (METHODOLOGY RESPONSE)	MAXIMUM TOTAL POINTS: 50
A	Quality Assurance: Please describe your approach to quality assurance and your QA practices from initiation through operations for ensuring the Solution is maintained and operates according to Service Level Agreements. Please detail:	8

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