



# MEMORANDUM

August 28, 2024

## Salesforce & Carahsoft - Contract Request

USHE's Talent Ready Utah is looking to engage Carahsoft in a comprehensive organizational implementation of Salesforce Nonprofit Cloud for Grantmaking. To move away from siloed manual systems, Carahsoft will configure and optimize a new Salesforce platform to manage the grant lifecycle including account and constituent engagement and contract management. By leveraging the Grantmaking Experience Cloud template, Carahsoft will work with Talent Ready Utah to improve the Grantseeker application process from application to MOU execution. This will also include extending functionality to include Talent Ready Utah's external review process for funding applications.

Carahsoft will integrate USHE's existing Tableau account with Salesforce so that Tableau can leverage Salesforce data and USHE's existing DocuSign account with Salesforce to collect e-signatures on NDAs, contracts, and MOUs. Carahsoft will also assist Talent Ready Utah in comparing document storage options between Box and Google Drive to best suit grant management, enable a sync with USHE's Outlook, and integrate and set up the Constant Contact Salesforce Connector to help manage current distribution lists.

Carahsoft will migrate legacy data from Google Sheets and work with Talent Ready Utah to design a clean and flexible future state data architecture to meet the organization's holistic needs to grow at scale.

Lastly, Carahsoft will assist Talent Ready Utah in creating foundational reports and dashboards and will provide training for both administrators and end users on the usage and maintenance of their new Salesforce platform including the USHE Experience Cloud site.

Talent Ready Utah will utilize non-lapsing departmental funds for the completion of this initiative.

### **Commissioner's Recommendation**

The Commissioner recommends that the Board enter into an agreement with Carahsoft to perform the above description of the Contract Request and deliverables outlined in the Scope of Work (below) at the cost of \$152,909.36.



## STATEMENT OF WORK ESTIMATE FOR SERVICES FOR: Utah System of Higher Education

**SOW#:** ARK-17617

Anticipated Duration: 33.6 Weeks

### High-Level Deliverables:

- Full end-to-end project management including weekly status reports.
- Detailed requirements gathering sessions to clarify any remaining points or questions around grants, approvals, reviews and application processes, automation needs, report criteria, and third-party integrations.
- Documentation of data model and system configuration to assist with user training and as needed toward the project goals.
- Set up and configuration of Salesforce based on requirements gathered, including Salesforce Nonprofit Cloud, Grantmaking, contract management workflow, and custom objects and fields as identified.
- Configuration of Grantmaking Experience Cloud site and workflows to facilitate self-service of grant applicants, grantees, and external reviewers.
- Consulting on and implementation of either Google Drive or DropBox for document management.
- Consulting on and implementation of a middleware solution for the Constant Contact integration.
- Migration and importation of legacy data from Google Sheets to Salesforce as provided in a standardized format.
- Integration of USHE's existing DocuSign account with standard signing functionality with the configuration of up to 7 envelope templates.
- Setup and configuration of Outlook integration with Salesforce leveraging a standard connector.
- Integration of USHE's existing Tableau account to ingest data from Salesforce.
- Integration and set up of the Constant Contact Salesforce Connector to support the management of RFP distribution lists.
- Assistance with the creation and scheduling of up to 5 reports and 1 dashboard to meet business requirements and allow analysis and monitoring of processes.
- Custom agenda and training of end users and administrators on Salesforce usage, best practices, and its usage in new or existing business processes.

### Notes:

- Salesforce configuration will be completed using out-of-the-box components and templates wherever possible.
- This SOW does not include any custom development or coding.
- Third-party integrations in this SOW assume the use of standard functionality and/or pre-built Salesforce AppExchange products. No custom integration development is accounted for in this SOW.

- To fully integrate Constant Contact with Salesforce, it is assumed a middleware solution will be needed.
- USHE is responsible for all data cleaning, deduplication, and population of provided templates for import to Salesforce.
- Should the volume or complexity of data transformation exceed that determined from what was described during scoping, additional time may be required.
- USHE is responsible for any additional costs associated with the usage of third-party integration tools.
- Will not be creating Views or Dashboards in Tableau as part of this project. Tableau work is limited to setting up the connector to provide access to Salesforce data in Tableau.

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## STATEMENT OF WORK ESTIMATES

ITEM - FEATURE	ESTIMATED HOURS
<b>Project Management</b> Management of project from start to finish coordinating schedule, updates, timelines, weekly status reports, and deliverables.	45 (\$253.87– hr.) <b>\$11,424.00</b>
<b>Engagement Management</b> Project oversight and support, technical and solution design review, and backup including periodic knowledge transfers.	23 (\$299.20 - hr.) <b>\$6,881.60</b>
<b>Detailed Requirements</b> Detailed discovery and gathering of business and system requirements from business stakeholders to meet the overall project goals.	19 (\$253.87- hr.) <b>\$4,823.47</b>
<b>Documentation</b> Documentation of data model and system configuration to assist with user training and as needed toward the project goals.	15 (\$253.87– hr.) <b>\$3,808.00</b>
<b>Consulting</b> Assist USHE in comparing document storage options between Box and Google Drive.	6 (\$262.93 - hr.) <b>\$1,577.60</b>
<b>Salesforce Configuration</b> Set up and configuration of Salesforce to meet the business requirements as defined in the statement of work description. This includes object, layout, permissions, and process automation customization via Salesforce Setup.	147 (\$253.87– hr.) <b>\$37,318.40</b>
<b>Customer Portal Configuration</b> Configuration of Grantmaking Experience Cloud site to facilitate self-service of grant applicants, grantees and external reviewers.	52 (\$253.87– hr.) <b>\$13,201.07</b>
<b>3rd Party Integration</b> Install and configure DocuSign, Tableau and selected document storage tool connectors with Salesforce.	89 (\$253.87– hr.) <b>\$22,594.14</b>
<b>Data Mapping</b> Documentation of grant data from Google sheets in preparation for the integration of legacy data into Salesforce.	15 (\$253.87– hr.) <b>\$3,808.00</b>
<b>Data Migration &amp; Cleansing</b>	59 (\$253.87– hr.)

Migration and importation of legacy client data from Google Sheets to Salesforce as provided in standardized format.	<b>\$14,978.14</b>
<b>Reports &amp; Dashboards</b> Creation and scheduling of up to 5 reports and 1 dashboard to meet business requirements and allow analysis and monitoring of process.	15 (\$253.87– hr.) <b>\$3,808.00</b>
<b>Testing &amp; Deployment</b> Full scope testing and quality assurance of system configuration.	101 (\$253.87 – hr.) <b>\$25,640.54</b>
<b>Training</b> Training for both administrators and end users on usage and maintenance of their new Salesforce instance including the USHE Experience Cloud site.	12 (\$253.87 – hr.) <b>\$3,046.40</b>

TOTAL ESTIMATED DELIVERABLES	13
TOTAL ESTIMATED HOURS	598
TOTAL ESTIMATED PROJECT COST	<b>\$152,909.36*</b>

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**PROJECT TEAM**

**Client Project Sponsor** Vic Hockett & Jimmy McDonough, Talent Ready Utah  
**Project Manager** Tiffany Stephan  
**Engagement Manager** Aaron Gunning