

USAFA Strategic Relationship Management (SRM)

Salient Characteristics

INTRODUCTION

USAFA seeks to acquire Salesforce to achieve several capabilities that are today performed in a combination of manual labor and antiquated or insufficient systems (such as MS access databases). Together, these capabilities are known as USAFA's Strategic Relationship Management (SRM). These capabilities are as follows:

- Research and Gift Funds Management
- Stakeholder Relationship Management
- Institutional Scheduling

This acquisition is the second increment of a much larger effort, which put in place a new student information system (Oracle PeopleSoft Campus Solutions in the Amazon Web Services Gov Cloud), course scheduling system (Infosilem), and recruiting and admissions system (Salesforce CRM and Salesforce Cloud). These integrated solutions were delivered to USAFA in a cloud environment and the new Salesforce solution will need to integrate cleanly into these systems. The specific salient characteristics needed from Salesforce are listed below.

Module #1: Research and Gift Funds Management (SALESFORCE SOLUTION: DMP & SALESFORCE PLATFORM)

- **BACKGROUND** - USAFA seeks to modify the existing CRM system to manage donations received from our non-profit partners. Overall, this is a requirement to configure workflows and dashboards to track roughly 100 accounts and 400 subaccounts, with changes in account status and information visible to others. Analysts will use a dashboard as a ledger capability to show the development of donations into services. It enables the staff to view their own dashboards to manage their accounts, generate workflows to request access to accounts, and report as needed.

This module will replace several custom-coded databases created in the early 1990's to track donation spending. The systems fails regularly, losing access to current data. Due to the limitations caused by the age of the databases and the inability to back up stored data, USAFA seeks an immediate solution. We seek to move these workflow processes with data elements into the new common SIS/Salesforce system.

This is not a request for an accounting capability. Market research shows that this is not an accounting requirement, and accounting software is ill-fit. Instead, this capability reduces to workflows and dashboards. It can be readily configured in the standard Salesforce Service Lighting license.

- **FUNCTIONAL REQUIREMENTS** - To deliver this capability, USAFA requires a system to provide the following common capabilities across all functional areas to include: ability to create and edit data fields, configurable web portals for various external customers/users, unique identification number for each user type (accounts, subaccounts), fillable forms, customizable notifications, analysis tools, ability to assign, configure and manage workflows, configurable user dashboards and workspaces. Ability to track and manage the donations to the Academy, create/update/modify/delete accounts and subaccounts, and view available funds, modify balances, and report as needed.

Module #2: Stakeholder Relationship Management (SALESFORCE SOLUTION: SALES CLOUD)

- **BACKGROUND** - USAFA seeks to extend the Recruitment and Admissions requirements to include additional engagements. This extends the marketing, communications, and customer service experience already

provided by the Salesforce Customer Relationship Management (CRM) to include communications with a broader range of internal and external stakeholders.

- **FUNCTIONAL REQUIREMENTS** - USAFA requires a system to provide the following common capabilities across all functional areas to include: ability to create and edit data fields, configurable web portals for various external customers/users, unique identification number for each user type (staff, cadets, cadet candidates, and community partners), fillable forms, customizable notifications, analysis tools, ability to track and manage the friends and supporters of the Academy to develop stronger relationships and brand ambassadors, ability to assign, configure and manage workflows, configurable user dashboards and workspaces, and calendar/scheduling functions. As much of marketing and recruiting execution requires extensive traveling, the system should allow internal users the same functionality regardless of worksite by enabling access that is agnostic to the type of mobile computing device employed (i.e. laptop, tablet, and smart phone). The system also requires the capability to plan and execute targeted marketing campaigns.

The system shall provide the capabilities to manage and collect Prospect, Lead, and Influencer contact information and segment by various attributes. Based on the ability to exploit the known information, the system shall provide capability to manage advertisement and marketing events to target specific segments of Prospects, Leads, and Influencers. Lead and Influencers can self-identify to be placed on their respective lists by providing bio-demographical information and areas of interest through an USAFA web portal. The system shall provide the capability to sort, filter, and track stakeholders. Key to identifying and maintaining strategic relationships is the ability to capture and present contact history and associate event participation in an integrated CRM tool. The CRM should enable effective internal communication across USAFA through all phases of this process and work seamlessly with USAFA's internal web portals (SharePoint and Salesforce).

Module #3: Institutional Scheduling (SALESFORCE SOLUTION: SERVICECLOUD; SUMO SCHEDULER)

- **BACKGROUND** - USAFA seeks to modify the existing admissions/recruiting scheduling process to enable other institutional scheduling. This system will replace a manual spreadsheet or Access database created for its institutional scheduling processes. This is a natural follow on to the capability Mythics is delivering through Salesforce now. The module requires the ability to schedule and manage events and enable internal and external (community partners) to exchange information with the Academy through USAFA's web portals.
- **FUNCTIONAL REQUIREMENTS** - USAFA requires a system to provide the following common capabilities across all functional areas to include: ability to create and edit data fields, configurable web portals for various internal and external customers/users, unique identification number for each user type (staff, cadets, cadet candidates, and community partners), fillable forms, customizable notifications, analysis tools, ability to assign, configure and manage workflows, configurable user dashboards and workspaces, and calendar/scheduling function with the capability to manage requests for events and manage resource requirements.

USAFA also hosts marketing events such as outreaches and forums. Forums are large marketing events to showcase USAFA to large wide spectrum audiences. Institutional Scheduling will utilize the CRM software to provide the ability to allow scheduling of events with the functional requirements to include:

System shall provide for iterative, tracked communications to coordinate event scheduling (time, resources, facilities etc.), ensuring the feasibility of the event.

System shall utilize dashboards and workflows to provide a mechanism for resource allocation between two or more divisions; ex. evening academic lecture that requires security forces resources.

System shall have the ability to allow scheduling of events (to include resources such as time, equipment, space, support personnel, etc.) for the following: Internal USAFA entity scheduling an event that only impacts

their department (no resource collaboration with other departments required); ex. Internal staff meeting; Internal USAFA entity scheduling an event that requires resource collaboration between two or more departments; ex. evening academic lecture that requires security forces support or cadet participation; USAFA Institution-wide events (aka “Institutional Events”) that require full logistical support from all USAFA Mission Elements; ex. Graduation; and external entity requesting to host an event at USAFA, ex: Tiny Homes Exposition.

Award will be made to the offeror meeting or exceeding the deliverables (evaluation factors) listed below.

Tech factor 1: Single Sign-On Capability and Security Requirements

The solution shall integrate with the current single sign-on capability where one authentication action allows users’ access to all resources, consistent with their role, within the platform without separate logins. As a minimum the forms of authentication required is Common Access Card (CAC)/Public Key Infrastructure (PKI) compliant and username/password. Internal users should have capability to sign-on via CAC or non-VPN username/password. To ensure accessibility of external users, there should be an ability to assign username/password sign-on capability.

System shall comply with all DoD and AF security controls and policies under RMF (Risk Management Framework). As the solution will be a cloud based DoD system, which stores minimally Personally Identifiable Information (rolodex), the system shall comply with DoD FedRamp Plus (Impact Level) IL4 requirements.

Tech factor 2: User Authentication

The platform shall integrate with USAFA’s proscribed capability of authenticating users through USAFA-established methods based on the level of security required. The platform shall provide the capability to specify mandatory minimum complexity and reset intervals for passwords. Examples of authentication will include: username/password, PKI, and other forms of two-factor authentication. The platform authentication process shall ensure data marked as private will remain viewable and discoverable only through secure role settings.

Tech factor 3: Role Assignment

The platform shall employ a role-based permissions model. It shall provide the capability to assign roles to a user or a group of users and to specify permissions of the same both automatically and manually. Examples of user roles include: USAFA staff, instructors, external users, cadets, and administrators. The platform shall be capable of handling users with multiple roles e.g., a user who is an instructor and a donor. The platform shall have the ability to create and assign groups of related user roles.

Tech factor 4: User Management

The platform shall have the ability to create, modify, copy, archive, and delete user accounts, both individually and in batches, both automatically and manually. The platform shall provide user account profiles, which shall be definable by the institution and shall include user roles and associated permissions. The platform shall have the ability to acquire user information from institution-defined, external data sources. Some stakeholder data

will have to be obtained from the current Student Information System (Oracle/PeopleSoft Campus Solutions) and the current Admissions system (Salesforce).

Tech factor 5: Status Indicator of Actions Pending

The solution shall have a status indicator that, upon login and user choice, notifies the user of all items that may have changed on stakeholder accounts. Examples of such notices include, but are not limited to: What's New, To Do, Needs Attention, Past Due, and Records Status Actions.

Tech factor 6: Reporting Requirements

This factor includes a robust reporting ability, which is further detailed in the Appendices. The reporting functionality should have both real-time dashboards, as well as an ability to generate dynamic and customizable reports from any of its data. USAFA senior leadership uses these reports and dashboards to support a variety of institutional and operational goals, to include donor management, cadet internships, event scheduling, and many others. Additionally, some reports are for external use, and shall meet requirements for Federal, State, HAF, DoD, Other Government Agencies, and Congress.

Tech factor 7: System Performance

The platform will need to provide a robust mobile capability, as many of USAFA's leaders travel and need stakeholder and events information at their fingertips. (For example, the itinerary of an upcoming distinguished visitor.)

Tech factor 8: Help Desk Support

Provide post implementation Help Desk support for technical assistance, support of delivered solution software, training, warranty, and maintenance, based on an 8 hour duty day, scheduled between the hours of 6:00 am to 6:00 pm Monday through Friday. 24x7 support may be required during mission critical events as determined by the Government. The Vendor may work, with prior approval of the Contracting Officer, extended hours to ensure timely completion of work at no additional cost to the Government. Vendor may propose Tiered support model for Help-desk as appropriate. Vendors may work with USAFA to leverage its existing service desk for call routing as appropriate. This support should be available for both the United States Air Force Academy and its air base mission support group "Go Live"; post the successful milestone/completion of Full Operating Capability (FOC), the plan to achieve the required help desk support should be captured in the project plan. Helpdesk should be available at IOC and fully established by FOC. The vendor shall provide training and training materials to USAFA staff to access this support.

- Go-Live Support: Cover all aspects of the implementation supporting the cut-over for 90 days providing adequate soft opening time for ensuring government personnel are familiar with the new system as well as support resources.
- On-going Support Help Desk: The contractor shall provide a help desk that provides support to USAFA and organizations in support of day to day operations for USAFA support, staff, and instructors. USAFA organizations would provide most day to day operations of the software, but the vendor must provide support to underlying infrastructure and software to allow USAFA to escalate to vendor managed services as needed. The vendor provided service shall include: Self-

service knowledge base, FAQ section, account creation/management (user profile) with individual password protection, inquiry submission that includes a ticketing process, administrative management capabilities for inquiries (transferring tickets amongst agencies, email notification of receipt, and information encryption), and a robust reporting process.

TRAINING REQUIREMENTS

Vendor shall provide a training plan and end user training to USAFA users on the use of the software. The training schedule will be determined after contract award and following initial configuration and validation accompanied with Business Process Re-engineering evaluation.

The vendor shall provide Initial and any required follow-on user training by an on-site trainer.

The vendor shall provide dedicated on-site technician/trainer during the initial on-lining period of the system. The trainer shall be capable of making on the spot changes and/or provide focused training as challenges or deficiencies are identified.

The vendor shall provide additional in-depth training to 3-5 "Power Users" for each capability deployed. These users will be trained in basic system troubleshooting.

User training shall be role based to support the varying degrees of system use.

User training shall be tailored (web based, in-person, off-site location, travel) depending on respective role and associated contractor professional input for best value approach.

Contractor shall provide all necessary training materials and resources to include: job aids, instructor-led, manuals, and online training.

On-site training at Government and contractor locations at USAFA Colorado Springs, CO.

User training shall include development, maintenance and updates to cadet and instructor training programs and materials.

User training shall stay current with the services offered throughout the life of the contract.

PROGRAM MANAGEMENT PLAN

A project manager will be appointed as the primary point of contact for USAFA to oversee all aspects of the managerial services; from initial analysis/validation, enterprise implementation and configuration, training, and system cutover. Managerial services shall include a Program/Project Plan with associated Charter, electronic Implementation Schedule/Integrated Master Schedule, Organizational Structure, Risk Id/Management, and Quality Management Plan as supporting artifacts of the Program/Project Plan.

Program Management deliverables shall also include:

- Weekly leadership calls facilitated by vendor leadership
- Strong coordination between vendor PM and USAFA PM
- Each project resource is required to update their project status from the IMS
- Weekly operations status calls by function/process
- Intersecting process/functional leads have standing meetings to ensure they are sync
- Early identification of program risks and mitigation strategy

CHANGE MANAGEMENT AND COMMUNICATION MANAGEMENT PLAN

USAFA's Organizational Change Management (OCM) considerations need to be adequately addressed and considered as part of this program. Appropriately trained functional staff and resources need to be dedicated to facilitate change management. USAFA expects a recommended OCM team structure that includes competencies necessary for successful implementation.

These plans will nest with USAFA Communications and Change Management Plan. Communication Management services shall be the ability to effectively communicate and manage project implementation and configuration services across USAFA enterprise Mission Elements and supporting 10th Air Base Wing agencies. This should be documented in a communications plan.