

REQUEST FOR PROPOSAL (RFP)

Original Date Issued: Monday, September 30, 2024

Deadline for Questions: Friday, October 4, 2024 5pm ET

Closing Date: Wednesday, October 9, 2024, 5pm ET

Anticipated Award Date: Wednesday, October 16, 2024

Reference: ICMA- SolSmart Program Management award DE-EE0009950 and WindWise DE-EE00011076; and IREC- SolSmart Program Management award DE-EE0009951 and Charging Smart DE- EE0011131

Subject: Request for Proposal - Revamp and Expansion of Salesforce Platform for Community Designation Programs

The International City/County Management Association (ICMA) and the Interstate Renewable Energy Council (IREC) working jointly seek proposals from eligible Respondents for professional services. ICMA/IREC anticipate selecting one (1) single vendor as a result of this solicitation. The selected consultant is expected to receive separate contracts from ICMA and IREC, with IREC funding phases I and III and ICMA funding phase II. ICMA/IREC reserve the right to award more or fewer awards than anticipated above.

Technical questions concerning this solicitation should be directed to Trudi Mendez (trudim@irecusa.org) and Debra Perry (dperry@icma.org) with a copy to workwithus@icma.org.

All communications must include the solicitation title, **Revamp and Expansion of Salesforce Platform for Community Designation Programs** in the subject line.

No communication intended to influence this procurement is permitted except by contacting the designated contacts above for clarifications. Contacting anyone other than the designated contacts (either directly by the Respondent or indirectly through a lobbyist or other person acting on the respondent's behalf) in an attempt to influence this procurement: (1) may result in a Respondent being deemed a non-responsive Respondent, and (2) may result in the Respondent not being awarded a contract.

This solicitation in no way obligates ICMA or IREC to award a contract nor does it commit ICMA nor IREC to pay any cost incurred in the preparation and submission of a proposal.

ICMA and IREC bear no responsibility for data errors resulting from transmission or conversion processes.

ICMA and IREC appreciate your responsiveness and look forward to a mutually beneficial business relationship.

Sincerely,

Debra Perry, ICMA Program Director, Clean Energy and Climate Resiliency
Trudi Mendez, IREC Data Systems Manager

PURPOSE

ICMA and IREC seek a qualified service provider to support the design, implementation and maintenance of a multi-tenant Salesforce platform for multiple programs funded by the U.S. Department of Energy (DOE), including the SolSmart, Charging Smart and Distributed Wind Smart energy designation programs. While these programs are funded separately, ICMA and IREC are seeking to manage these three projects in an integrated fashion and therefore require the salesforce platform be enhanced to support that integration.

ABOUT ICMA

ICMA advances professional local government worldwide. Our mission is to advance professional local government through leadership, management, innovation, and ethics. ICMA provides member support, data and information, peer and results-oriented technical assistance, and training and professional development to more than 11,000 ICMA members, city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

ICMA is a 501(c)(3) nonprofit organization founded in 1914 that offers a wide range of services to its members and the local government community. The organization is an internationally recognized publisher of information resources ranging from textbooks and survey data to topical newsletters and e-publications. ICMA provides technical assistance to local governments in developing and decentralizing countries, helping them to develop professional practices and ethical, transparent governments. The organization performs a wide range of mission-driven grant and contract-funded work both in the U.S. and internationally, which is supported by federal government agencies, foundations, and corporations.

ICMA co-leads SolSmart with IREC (current DOE award DE-EE0009950). ICMA has recently been awarded a contract from DOE for Distributed Wind Smart (DOE award DE-EE00011076).

For more information regarding ICMA's programs and services, please go to www.icma.org.

ABOUT IREC

IREC is an independent, national, 501(c)(3) nonprofit organization advancing a 100% clean energy future that is resilient, reliable, and equitable. As part of its work, IREC supports local communities to set and achieve clean energy goals and to remove barriers to clean energy adoption. IREC was founded in 1982 and currently has approximately 35 employees.

IREC co-leads SolSmart with ICMA (current DOE award DE-EE0009951). IREC has recently been awarded a contract from DOE for Charging Smart (DOE award DE-EE0011131).

SCOPE OF WORK

I. Background

Interstate Renewable Energy Council (IREC) and the International City/County Management Association (ICMA) have been jointly managing the U.S. Department of Energy-funded [SolSmart](#) program since 2015. SolSmart is a technical assistance and community designation program that supports communities in setting and achieving goals to accelerate solar adoption. An existing Salesforce platform is used to set up custom criteria for each community and to collect information from communities in support of their application for designation. Currently there are over 500 communities that have received SolSmart designation.

IREC and ICMA are launching sister programs, Charging Smart focused on electric vehicle (EV) charging infrastructure (Charging Smart) and distributed wind (Distributed Wind Smart), each funded separately through cooperative agreements with the U.S. Department of Energy. The three programs will be separate but complementary programs – all working to serve local governments at the city, county or regional level. Some communities may choose to participate in just one program, while others may choose to participate in two or all three.

The Salesforce platform is used to track program related communities, accounts and contacts as they go through the designation process. There are three designation pathways (standard, modified and regional) with associated criteria that lead to four designation levels (bronze, silver, gold and platinum).

The current Salesforce platform supports over 500 communities that have received SolSmart program designation with ~6000 contact records. An administration team tracks community engagement as they progress through outreach, technical assistance and designation phases. Community data is tracked using dashboards, custom reports and a variety of user interfaces leveraging role-based apps.

The selected vendor will work closely with IREC and ICMA staff to simplify the existing administration workflow and make improvements to the existing instance and associated applications to ensure the system supports the success of all three programs.

II. Deliverables

Phase I: Discovery + Analysis of the existing Salesforce platform (funded by IREC)
(~2 month engagement from mid-Oct – Dec 2024)

- Detailed evaluation of the data model and table mapping
- Review of existing Apex Classes and triggers
- Review of existing processes for the various roles
- Review of existing user interface and associated layouts and views
- Review of existing declarative automations (workflows + flows)
- Review of existing pain points in the existing platform

- Identification of new functionality requirements
- **Key deliverable:** Provide a detailed proposal on the pathway to a multi-program model

Phase II: Transformation of the existing platform and rollout of multi-program model to include Charging Smart and Distributed Wind Smart programs (funded by ICMA)

(~6 month project engagement from Jan 2025 – June 2025)

- Design a strategic roadmap for the transformation from a single program to a multi-program model
- Work with IREC and ICMA to build out a monthly release plan that addresses:
 - Architectural changes
 - Declarative Automation needs and updates
 - Custom code needs and updates
 - Ticketing System redesign
 - User Interface + Layout redesign
 - New functionality requests identified in Phase 1
- Reconfigure the existing Salesforce platform for the SolSmart program in preparation for a multi-program model.
- Lead implementation efforts for additional designation programs (i.e., Distributed Wind Smart and Charging Smart) on the Salesforce platform
- Troubleshoot issues encountered during rollout and implementation
- Provide documentation that details how the administration team would utilize Salesforce to support designation program activities for all roles.
- Provide documentation that details the technical and functional design
- Deliver training on the Salesforce platform leveraging a train-the-trainer model as part of transition to the administration team
- **Key deliverables:**
 - Reconfiguration of Salesforce platform to accommodate multi-program model
 - Relaunch platform to support additional designation programs, including Distributed Wind Smart and Charging Smart

Phase III: Managed services (funded by IREC)

(~12 month reduced engagement from July 2025 – June 2026)

- Manage the testing + deployment of Salesforce quarterly releases
- Provide ongoing technical support and strategic guidance



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INTERNATIONAL CITY/COUNTY
MANAGEMENT ASSOCIATION

SUBMISSION REQUIREMENTS

<p>Section 1. Approach (4 page limit)</p>	<p>A description of your proposed approach to each phase described above. Include strategies for ensuring communication, feedback, and successful implementation and rollout.</p>
<p>Section 2: Statement of Qualifications (2 page limit)</p>	<p>A description of your organization’s experience providing services similar to those requested in this solicitation, as well as a sample client list indicating the type of services rendered. Projects involving proposed key personnel are preferred.</p> <p>Brief description of all key personnel anticipated to participate in Salesforce Support services. (Please include CV/resume for each key personnel as attachments. Does not count toward the page limit)</p>
<p>Section 3: Directly Relevant Experience (3 page limit)</p>	<p>At least three (3), but not more than five (5) examples of similar projects, including location, client, and type of work performed. (attachments will not count toward the page limit)</p> <p>For each project also include the client contact information and website address. References will be contacted as part of the evaluation process.</p>
<p>Section 4: Pricing (1 page max)</p>	<p>Include pricing estimates for each of the phases described in the Scope of Work. Pricing for each phase must be clearly delineated.</p> <ul style="list-style-type: none"> ● Phase I: Discovery + Analysis of the existing Salesforce database (est. 2 months) ● Phase II: Transformation of the existing platform and rollout of multi-program model to include Charging Smart and Wind Wise programs (est. 6-8 months) ● Phase III: Managed services (12 months)



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MANAGEMENT ASSOCIATION

	<p>For Phase I and II, ICMA/IREC will consider a proposal that is either fixed-fee or other arrangement fair and favorable to ICMA/IREC. For Phase III, proposals should provide a month rate for managed services.</p> <p>For other than a fixed-price arrangement, please describe your pricing method and why this would be advantageous to ICMA/IREC.</p> <p>As recipients of federal government funding, please be advised that ICMA/IREC will be adhering to federally mandated requirements regarding procurement.</p>
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TYPES OF CONTRACTS TO BE AWARDED

TBD

CONTRACTS TERMS AND DELIVERY DATES

TBD

The selected contractor will enter into separate agreements with ICMA and IREC. ICMA/IREC expect Phase I and II of this scope of work to be completed within 10 months and Phase III is expected to be 12 months. Final delivery dates will be negotiated upon award.

EVALUATION AND AWARD PROCESS

Offers will be evaluated based upon the following criteria and designated percentages:

- Section 1: Approach (20%)
- Section 2: Statement of Qualifications (30%)
- Section 3: Directly Relevant Experience (30%)
- Section 4: Price (20%)

ICMA/IREC reserve the right to award under this solicitation without further negotiations. The respondents are encouraged to offer their best terms and prices with the original submission.

INSTRUCTIONS TO RESPONDENTS

Respondents interested in providing the services described above should submit a proposal following the prescribed format in the Submission Requirements section of this RFP.

Adherence to the proposal format by all respondents will ensure a fair evaluation with regard to the needs of ICMA and IREC. Respondents who do not follow the prescribed format may be deemed non-responsive.

1. Transmission letter signed by an officer of the firm authorized to bind the respondent as required by this solicitation.
2. Package no more than 10 pages excluding CV's or resumes, work samples, and other attachments.

Additional forms will be required upon selection per each organization's requirements.

Packages must be submitted electronically to Trudi Mendez at IREC (trudim@irecusa.org), Debra Perry (dperry@icma.org) and to Work With Us (workwithus@icma.org) with a subject line noting the RFP title (Revamp and Expansion of Salesforce Platform for Community Designation Programs) and reference found on page one of this solicitation. No phone calls please.

Applications received after the closing date stated on the top of page 1 will be rejected.

GENERAL CONDITIONS

Proposal Submission - Late proposals and proposals lacking the appropriate completed forms will be returned. Faxed proposals will not be accepted. Proposals will not be accepted at any other ICMA or IREC location other than the email addresses above. If changes are made to this solicitation, notifications will be sent to the primary contact provided from each Respondent. ICMA and IREC take no responsibility for effective delivery of the electronic document. The vendor offer will be rejected if the vendor modifies or alters the electronic solicitation documents.

Contract Award - ICMA/IREC anticipate selecting one vendor under this solicitation. ICMA/IREC may award a contract based on initial applications without discussion, or following limited discussion or negotiations. Each offer should be submitted using the most favorable cost and technical terms. ICMA/IREC may request additional data or material to support applications. ICMA/IREC expects to notify Respondents in approximately one week from the proposal due date whether your proposal has been selected to receive an award.

Limitation - This solicitation does not commit ICMA nor IREC to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. ICMA and IREC reserve the right to accept or reject any or all proposals received, to negotiate with all qualified sources, or to cancel in part or in its entirety the solicitation when it is in the best interest of ICMA and/or IREC.

Disclosure Requirement - The Respondent shall disclose any indictment for any alleged felony, or any conviction for a felony within the past five years, under the laws of the United States or any state or territory of the United States, and shall describe circumstances for each.

When a Respondent is an association, partnership, corporation, or other organization, this disclosure requirement includes the organization and its officers, partners, and directors or members of any similarly governing body. If an indictment or conviction should come to the attention of ICMA or IREC after the award of a contract, ICMA or IREC may exercise its stop-work right pending further investigation, or terminate the agreement.

No Gifts - It is the Policy of ICMA and IREC that no gifts of any kind and of any value be exchanged between respondents and ICMA/IREC personnel. Discovery of the same will be grounds for disqualification of the Respondent from participation in any future procurements and may result in disciplinary actions against ICMA/IREC personnel involved in such discovered transactions.

Equal Opportunity - In connection with the procurement of the specified services, the firm warrants that it shall not discriminate because of race, color, religion, sex, national origin, political affiliation, non-disabling physical and mental disability, political status, matriculation, sexual orientation, gender identity or expression, genetic information, status as a veteran, physical handicap, age, marital status or any other characteristic protected by law.

Small and Disadvantaged Businesses - ICMA/IREC shall use good faith efforts to provide contracting and procurement opportunities for SBD's. SDB categories include minority business enterprises (MBE), woman-owned business enterprises (WBE), small veteran and disabled veteran owned businesses, Historically Black Colleges and Universities (HBCUs), predominantly Hispanic Universities (HACUs), small businesses in Historically Under-utilized Zones (HUBZones) and private voluntary organizations (PVOs) principally operated and managed by economically disadvantaged individuals.

END OF REQUEST FOR PROPOSAL (RFP)