Purchase Order: Technical Salesforce Integration and Administration Services: Slalom, LLC (Slalom, LLC) ($3,348,800)

Subject:

Under this purchase order, Slalom, LLC (Slalom) would provide consulting services to develop and operate the regional and internal customer account management programs in Salesforce.

Background:

The MTC Salesforce platform currently provides the FasTrak case escalation management system, Clipper START application and customer service system, and the MTC/ABAG Contacts Center. MTC will soon launch the e-Bike Rebate application and customer service system, the MTC Help Desk system, and the Regional Transit Connection (RTC) discount card intake and verification system.

Contract Actions:

Under the proposed purchase order, Slalom would perform discovery work, operate and maintain, and further extend the Salesforce platform to support both regional mobility means-based initiatives and internal MTC business operations. The following projects are expected to be completed in fiscal year 2022-23 for the indicated anticipated costs:

A.   Enhancement of the MTC Help Desk system ($100,000)

B.   Enhancement and development of regional mobility discount programs including RTC, Clipper START C2 Integration, Express Lanes START, and the BATA Low-Income Pre-Qualification Program ($1,988,800)

C.   Discovery, contractor transition, and ongoing operations and maintenance of the Salesforce platform and MTC's active programs ($1,260,000).

Slalom's services were procured using the California Multiple Award Schedule (CMAS), a collaborative intergovernmental procurement vehicle, which satisfies MTC's competitive procurement requirements. Slalom is an authorized vendor under CMAS and has been recognized as a Salesforce Partner and a multiple-year winner of Salesforce's Innovation Award. Slalom is neither a small business nor a disadvantaged business enterprise and currently has no subcontractors.
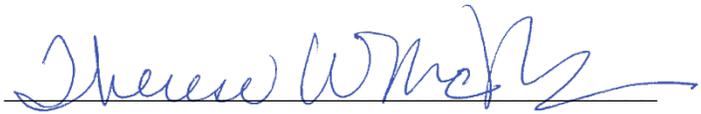
Issues:

None identified.

Recommendations:

Staff recommends that the Operations Committee authorize the Executive Director or designee to issue a purchase order to Slalom, LLC in an amount not to exceed $3,348,800 to provide technical Salesforce integration and administration services.

Attachments:

None.

Therese W. McMillan

Request for Committee Approval

Summary of Proposed Purchase Order

Work Item No.:	8902, 1131, 1251, 6854, 1161, 1252, 2784
Consultant:	Slalom, LLC
	Seattle, WA
Work Project Title:	Technical Salesforce Integration and Administration Services
Purpose of Project:	To provide technical integration and administration services for Salesforce platform development.
Brief Scope of Work:	Provide technical integration and professional services to design, develop, enhance, and maintain the Salesforce platform for regional and internal customer account management program needs.
Project Cost Not to Exceed:	$3,348,800
Funding Source:	General Funds, STA, BATA, BAIFA, LCTOP
Fiscal Impact:	$3,348,800 is included in the FY 2022-23 MTC budget, as follows:

- FasTrak Case Management O&M: $25,000 – BATA
- Agency CRM Development: $100,000 – General Funds
- Agency CRM O&M: $525,000 – General Funds
- E-Bike Rebate O&M: $160,000 – BATA
- Clipper START O&M: $200,000 – LCTOP
- C2 Integration: $550,000 – LCTOP
- Express Lanes START Development: $50,000 – BAIFA
- Express Lanes START O&M: $250,000 – BAIFA
- RTC Phase 2 Development: $388,800 – STA
- RTC O&M: $100,000 – STA
- BATA Low-Income Pre-Qualification Program: $1,000,000 - BATA

Motion by Committee: That the Executive Director or designee is authorized to issue a purchase order to Slalom, LLC for technical Salesforce integration and administration services described above and in the Operations Committee Summary Sheet dated July 8, 2022 and that the Chief Financial Officer is authorized to set aside $3,348,800 for such purchase order.

Operations Committee:

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Carol Dutra-Vernaci, Chair

Approved: July 8, 2022