

**Metropolitan Transportation Commission
Operations Committee**

April 14, 2023

Agenda Item 4c

Customer Account Management Platform Contract Actions:

- i. Purchase Order: Technical Salesforce Integration and Administration Services: Slalom, LLC (\$2,975,000)**
 - ii. Purchase Order Amendment: Salesforce Licenses: Carahsoft Technology Corp (\$560,000)**
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Subject:

Customer Account Management Platform Contract Actions: i. Purchase Order - Technical Salesforce Integration and Administration Services: Slalom, LLC (Slalom) (\$2,975,000). ii. Purchase Order Amendment - Salesforce Licenses: Carahsoft Technology Corp (Carahsoft) (\$560,000)

Background:

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

Contract Actions:

Staff recommends that the Operations Committee authorize the Executive Director or his designated representative to issue the following purchase orders:

- i. Technical Salesforce Integration and Administration Services: Slalom, LLC (\$2,975,000)**

Under the proposed purchase order, Slalom would 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 2023-24 for the indicated anticipated costs:

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

- B. Operations and maintenance of Salesforce Org and existing programs
(\$1,125,000)
- C. Discovery and development of a consolidated mobility discount program portal, bringing together existing programs such as Clipper START, Express Lanes START, Richmond San Rafael Bridge e-Bike Rebate Program, and the BATA Low-Income Payment Plan, for a more customer friendly enrollment experience
(\$1,250,000)
- D. Discovery and development of Salesforce Marketing Cloud for public engagement communications and public comment management (\$500,000)

Slalom's services are 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 amendment to Slalom, LLC in an amount not to exceed \$2,975,000 to provide technical Salesforce integration and administration services as described herein.

Attachments:

None.

ii. **Salesforce Licenses: Carahsoft Technology Corp (\$560,000)**

Under this purchase order amendment, Carahsoft would provide Salesforce licenses for use in developing and operating the regional and internal customer account management programs in Salesforce. Carahsoft's services were procured using CMAS. Carahsoft is an authorized vendor under CMAS and is Salesforce's Master Value Added Reseller and Aggregator in the US public sector. Carahsoft 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 amendment to Carahsoft Technology Corp. in an amount not to exceed \$560,000 to continue to provide Salesforce licenses.

Attachments:

None.



Andrew B. Fremier

Request for Committee Approval

Summary of Proposed Purchase Order

Work Item No.:	1161, 1239, 1251, 1311, 2784, 1998
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:	\$2,975,000
Funding Source:	General Funds, BATA, LCTOP, STA
Fiscal Impact:	\$2,975,000 is subject to approval in the FY 2023-24 MTC budget, as follows: <ul style="list-style-type: none">• Agency CRM Development: \$100,000 – General Funds• Agency CRM O&M: \$625,000 – General Funds• BATA Low-Income Payment Plan O&M: \$200,000 – BATA• FasTrak Case Management O&M: \$25,000 – BATA• Clipper START O&M: \$200,000 – LCTOP• RTC O&M: \$75,000 – STA• Consolidated Mobility Discount Portal: \$1,250,000 – General Funds• Marketing Cloud: \$500,000 – General Funds

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 April 14, 2023 and that the Chief Financial Officer is authorized to set aside \$2,975,000 for such purchase order.

Operations Committee:

David Rabbitt, Chair

Approved:

April 14, 2023

Request for Committee Approval

Summary of Proposed Purchase Order Amendment

Work Item No.:	1998, 1131, 1251, 6854, 2784
Consultant:	Carahsoft Technology Corp. Reston, VA
Work Project Title:	Salesforce Licenses
Purpose of Project:	To provide Salesforce licenses.
Brief Scope of Work:	Provide Salesforce licenses to operate and enhance the Salesforce platform for regional and internal customer account management program needs.
Project Cost Not to Exceed:	\$560,000
Funding Source:	General Funds, BATA, BAIFA, STA, LCTOP
Fiscal Impact:	\$560,000 is subject to approval in the FY 2023-24 MTC budget, as follows: <ul style="list-style-type: none">• Agency CRM: \$318,000 – General Funds• BATA Low-Income Payment Plan - \$45,000 – BATA• FasTrak Case Management: \$17,000 – BATA• RSR Bridge E-Bike Rebate: \$15,000 – BATA• Express Lanes START: \$50,000 – BAIFA• RTC: \$65,000 - STA• Clipper START: \$50,000 - LCTOP

Motion by Committee: That the Executive Director or designee is authorized to issue a purchase order amendment to Carahsoft Technology Corp. for technical Salesforce integration and administration services described above and in the Operations Committee Summary Sheet dated April 14, 2023 and that the Chief Financial Officer is authorized to set aside \$560,000 for such purchase order.

Operations Committee:

David Rabbitt, Chair

Approved:

April 14, 2023